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I. PURPOSE

The purpose of this document is to establish a uniform, businesslike approach in the procurement of goods and services by county Disabilities and Special Needs Boards and other community-based providers of services to people with disabilities. The directive is intended to ensure that local providers procurement practices maximize the use of funds allocated by SCDDSN for goods and services.

II. APPLICABILITY

This document applies to all county Disabilities and Special Needs Boards, nonprofit organizations, or for-profit organizations (hereinafter referred to as "providers") receiving grants or contract funding from the South Carolina Department of Disabilities and Special Needs. This directive was written to be compliant with the South Carolina Consolidated Procurement Code, which may be referenced for additional guidance, however DSN Boards are not required to comply with this code.

III. ADOPTION OF PROVIDER PROCUREMENT POLICIES AND PROCEDURES

All providers shall establish procurement policies and procedures with requirements at least as restrictive as those contained in this directive. The policies and procedures shall be approved by the providers governing boards and shall apply to all procurement activities supported in whole or in part by SCDDSN funding. If both a nonprofit organization and county Disabilities and Special Needs Boards operate programs in a county, governing boards of both entities should approve the policies and procedures. DSN shall provide assistance to providers in developing and implementing procurement policies and procedures.

It is possible that a Disabilities and Special Needs Board is considered to be an agency of a county government and their procurement policy is covered by that county's policy. If a local provider and county government determine that the county government's code pertains to them, it will not be necessary to adopt another set of policies and procedures.

IV. STANDARDS OF CONDUCT

Each provider shall establish and implement a written code of conduct governing the board members, employees, or agents as part of the procurement policy. The code shall specify that no employee, board member, or agent of the local board shall

participate in vendor selection or in the award or administration of a purchase supported by DDSN award funds, if a conflict of interest would be involved. Such a conflict would arise when:

- (a) an employee, board member, or agent;
- (b) any member of his or her family;
- (c) his or her partner; or
- (d) an organization which employs or is about to employ any of the above;

has a financial or other interest in the firm selected for the purchase. The providers code of conduct does not have to prohibit awards to these parties, but should prohibit their participation in the selection process or in administration of purchases where there would be a conflict of interest.

The code of conduct also should prohibit employees, board members, or agents from soliciting or accepting personal gratuities, favors, or anything of monetary value from contractors/suppliers, potential contractors/suppliers, or parties.

The State Ethics Code, South Carolina Code of Laws Sections 8-13-10 through 8-13-1020, governs Disabilities and Special Needs Boards. Non-profit boards shall use the State Ethics Code as a guide in developing codes of conduct.

V. STANDARDS FOR PROCUREMENT POLICIES AND PROCEDURES

The provider's policies and procedures shall ensure that all procurement transactions are conducted in a manner that provides maximum open and free competition. The following guidelines shall be used by the provider in developing procurement policies and procedures:

A. Confidentiality of Price Information

The provider personnel shall not supply information concerning prices to prospective bidders for items or services being procured.

B. Procurement and Source Selection

Direct procurement shall be accomplished by means of a properly authenticated purchase order. A single provider

employee ("purchasing official") should be authorized to approve purchases.

It is recommended that each local provider establish a minimum dollar limit for board involvement in a purchase. Under such a provision, the board would have to approve any purchase above that level.

In regard to source selection, the provider's policies shall apply the following rules to purchases, except for emergency, sole source, and professional services procurements, covered in Sections VIII; C, D, and E:

VI. Solicitation Limits

Below are the solicitation limits as defined by the Consolidated Procurement Code:

(a) \$2,500 or less

May be accomplished without securing competitive quotations. The purchasing official's signature affixed to the purchase order constitutes certification that the price is fair and reasonable. Award determination will be made based on recent purchasing experience, knowledge of current markets. When practical, a quotation will be solicited from a source other than the previous supplier of such goods and services.

(b) \$2,500.01 to \$10,000.00

Verbal solicitation of no fewer than 3 written quotes. Award shall be made to the party providing the lowest quote who is also both responsive (provided all information requested) and responsible (able to perform the work). Documentation of the quotations, including "no bid" responses, shall be filed with the official record copy retained by the provider. Faxed quotes acceptable.

(c) Purchases from \$10,000.01 to \$50,000.00 (See Appendix A)

Written solicitation of written quotes must be made. The procurement must be advertised. Advertised requirements may be met by either advertising in providers local newspaper or in the South Carolina Business Opportunities (SCBO) magazine which is distributed twice weekly by the Materials

Management Office of the Division of General Services. Stated response date for quotes should be 7-10 days after mailing date. Written quotations received, including "no bid" responses, shall be filed with the requisition, a clean copy of the written quote, a copy of the vendor listing, a copy of the tabulation sheet, a copy of the award statement and a copy of the advertisement. The above listed documentations will become the official record copy retained by the provider. Faxed quotes accepted. Award shall be made to the party providing the lowest quote who is also both responsive (provided all information requested) and responsible (able to perform the work).

(d) Purchases \$50,000.00 and higher (See Appendix B)

The "Invitation to Bid" process is used. Formal solicitation using specifications, advertisement and time allowed for clarification of questions. Generally, Sealed Bids should be opened 21 working days from mail date. Shorter opening dates (7-10 days) may be required and documentation should be noted in file as to why short bid cycled was required. Bids must contain place bids are to be mailed and opened, opening date and time, name and contact information of the person submitting the bid. Bids will be kept secured until opening time and date. Bid opening will be announced at time of opening and no new bids will be accepted. The bids will be tallied at the opening and this tabulation will be open for public inspection at that time. Award shall be made to the party providing the lowest bid who is also both responsive (provided all information requested) and responsible (able to perform the work). Remember, lowest bid may not be winning bid.

VII. Sources of Procurement

A. State Contract

Boards may utilize the state contracts for their needs. All vendors that have state contracts may not want to participate, however the first option should be the state contract. The web site is www.procurement.sc.gov. Click on Goods and Services contracts.

B. State Surplus Property

Another source for purchasing is the State Surplus property office. It is located in West Columbia on Boston Avenue. They have items that are surplus by other state agencies. Some items are in great shape and some are not. They are also the

avenue for Federal Surplus which may be purchased. Both have items such as vehicles, furniture, clothing and office supplies and equipment. Their web address is www.scsurplusproperty.com.

VIII. Procurement Methods

A. Small Purchases (No Quotes)

The Executive Director should set a limit on a procurement spending level before requiring competition. As listed in section VI, the limit MMO has set is 2500.00. The Board's limit should not exceed this but does not have to be that high. Also, the Boards can set limits on individual's procurement level. Documentation should be kept with the procurement package for the length of time required for procurements.

B. Written Solicitations

For any dollar amount \$10,000.01 or above, a written solicitation must be issued prior to making a purchase. The two primary solicitation methods are: (1) Request for Quote (see Appendix A) and (2) Invitation for Bids (see Appendix B).

Boards may set the "Invitation for Bid" or "Request for Quote" limit on any amount, but please remember the \$2,500.00 limit was setup for small purchases. Any amount over that, and if it was for modifications, requires the solicitation of quotes/bids. Below \$10,000.01, the solicitation does not need to be in writing.

Both of these methods afford the opportunity to specify the requirements and the terms under which the procurement is to be conducted. These specifications must contain clear and precise information to ensure that needs are satisfied as intended. If they are left too ambiguous, a vendor will be able to use their own interpretation of the requirement in order to fulfill it by means best suiting themselves as opposed to the Board. Care must also be taken not to make the specifications so restrictive that they unnecessarily reduce the number of offerors. In short, specifications should be written so that an offeror can be both responsive and responsible. Written solicitations are used to encourage competition, so the more offerors that are willing to, and

capable of doing the work, the more likely you are to receive the best possible price.

Competition is promoted through the mandatory advertisement of written solicitations. These advertisement requirements, in the case of the Invitation For Bids must be met by advertising in South Carolina Business Opportunities (SCBO) magazine which is distributed twice weekly by the Materials Management Office (MMO) of the Division of General Services. When issuing a Request for Quotes, this requirement may also be met through advertisement in the providers' local area newspaper(s). Consideration on all advertisements must be given as to the actual print date of the advertisement versus the opening/submission deadline date of the solicitation, including any holiday schedules. A copy of each advertisement must be maintained as part of the procurement record. Refer to the documentation in Appendices A and B for more detailed information on SCBO.

Once a solicitation has been issued, specifications may only be changed through the issuance of a written amendment. An amendment must also be used to respond to any questions asked by prospective offerors so that each has access to the same information when submitting a bid/quote. Amendments must be sent to each vendor to whom a copy of the solicitation has already been sent. Following the issuance of an amendment, should a copy of the solicitation be requested, that prospective offeror will be supplied with a copy of the solicitation and any amendments that have been issued. The issuance of amendment often necessitates the need to extend the bid opening/deadline for submission and must be taken into account. Such an extension may be included in any amendment.

Following the bid opening/deadline for submission, the bids/quotes received must be tabulated. In all cases, the award shall be made via written notice to the lowest bidder/offeror that is responsive, qualified, and able to meet the requirements defined in the solicitation. A responsive bidder/offeror is one that responds to a solicitation by providing everything requested of them within the timeframe defined in the solicitation.

Bid/quote information and prices shall not be revealed after opening date and prior to an award. Thereafter, the purchasing official may reveal such information for bids and quotes. Information provided will be limited to the name of

the firm or person awarded the contract, the total dollar amount, number of units purchased, and reason(s) for rejecting any bids/quotations of a lower dollar amount.

The award shall be made via written notice, signed by the Executive Director of the Board. This document shall be sent to each offeror that either submitted a bid/quote. In addition, a copy must be given to the consumer being served by the procurement and another to DDSN. Complete written justification (as part of the procurement record) is required for the rejection of any quote or bid that is lower than the one selected for award.

(1) Written Request for Quotes (Appendix A)

This is a simplified solicitation method that does not require adherence to the sealed bidding procedures. If upon verbally soliciting quotes anticipated to fall below the established limit for this solicitation type, but which ends up at or above that dollar amount, a purchase must not be made until one of the aforementioned written solicitation methods have been completed and a proper award has been made.

The deadline for submission of quotes must be set no sooner than seven days after the required advertisement appears in the applicable periodical. Potential offerors must have sufficient time to receive the solicitation and respond to it prior to the submission deadline.

When utilizing the Request for Quotes solicitation method, it is required that a minimum of three quotes be received. To facilitate this, the solicitation documents should be sent to at least three vendors; each of whom has the option of responding with "No Quote." Such a statement may count for one of the three quotes, but only if it is made on a returned copy of the solicitation document and prior to the deadline for submission. Following the deadline for submission of quotes, each quote received will be tallied on the quote Tally Sheet (located in Appendix A).

Following release of the award statement, a copy of the solicitation and each of the quotes received should be retained with your procurement records.

For more detail concerning the Request for Quotes solicitation method, please refer to Appendix A which includes the template documents necessary to complete such procurements. The use of these templates is strongly encouraged when utilizing the Request for Quotes solicitation method. Also included is a reference sheet providing more specific procedures and an explanation of each of the templates provided.

(2) Invitation for Bids (Appendix B)

The Invitation for Bids is utilized as part of a more comprehensive method of procurement that is used when making higher value purchases. Should you conduct a Request for Quotes and find upon receipt of the quotes, that the lowest responsive and responsible source is equal to or above the limit set for the Invitation for Bids, that solicitation must be cancelled and an Invitation for Bids released prior to making a purchase.

This procurement method requires adherence to the sealed bidding procedures. Written on the Invitation For Bids must be the date and time of the bid opening and, if you choose to apply one, the deadline for questions to be submitted. Bids may not be opened prior to the stated bid opening and date, and only in the presence of a witness. They must be kept secure until the time for opening has arrived. Any questions received in response to the solicitation must be answered in the form of a written amendment.

All Invitation for Bids must be advertised in SCBO with the ad being published no sooner than seven days prior to the bid opening. If a deadline for questions is defined on the solicitation documents, then the ad must appear no sooner than twelve days prior to the bid opening. The question deadline must be timed carefully to allow prospective bidders time enough to examine the solicitation and formulate questions. The amendment must be issued with sufficient time for the prospective bidders to receive and review the answers and then submit their bids.

Bid openings must be tallied and then initialed both by the individual opening the bids and a witness. The tally must be made open to public inspection at that time.

Award statements must be posted at a location identified in the solicitation document. It is recommended that

this location be the same location at which the bid opening is held. It is further recommended that a notebook be maintained which contains all award statements.

For more detail concerning the Invitation for Bid solicitation method, please refer to Appendix B which includes the template documents necessary to complete such procurements. The use of these templates is strongly encouraged when utilizing the Request for Quotes solicitation method. Also included is a reference sheet providing more specific procedures and an explanation of each of the templates provided.

C. Emergency Procurements

Direct procurement of goods or services is authorized to meet needs that require immediate action to alleviate threats to consumers health, welfare, or safety. The requirements for obtaining quotations or securing bids is waived to the extent necessary to ensure that delivery of goods or services can meet the emergency needs. The following procedures shall be required for emergency purchases:

- (1) The provider purchasing official or other official assigned the responsibility for emergency procurement shall prepare a report of the circumstances that necessitated the procurement and selection of a particular source. This report shall be prepared as soon as possible following the emergency procurement. A copy of the report shall be approved by the local DDSN board's chief administrative officer and retained with the file copy of the purchase order.
- (2) If the emergency procurement was made by a person without designated procurement authority, his or her action must be approved by the chief administrative officer and governing board and documented accordingly with the file copy of the purchase order.

D. Sole Source Procurement

When a purchasing requirement, other than in emergency situations, can be met by only one supplier, the provider purchasing official shall obtain a written determination from the chief administrative officer stating that the item or service is available from only one source. The determination shall cover a single procurement unless a duration period is

specified. The determination shall include the reason(s) for procurement from a single source and, if applicable, the basis for the period of time the determination will remain in effect. One copy of the determination shall be filed with the purchase order file copy.

E. Professional Services Source Selection

The provider shall establish separate procedures for procurement of professional services including, but not limited to, legal, auditing, medical, dental, consultants, psychological, therapy services, real estate agents, etc. These services should be procured on a fee basis rather than on a competitive bidding basis. Procedures should ensure evaluation of the reasonableness of the fees consistent with 250-05-DD, "Cost Principles for Grants and Contracts with Community Local DSN Boards." When possible it is recommended that provider procedures require solicitation of proposals from potential contractors through issuance of requests for proposals (RFPs) which enumerate requirements.

F. Unauthorized Procurements

Except in emergencies, no person may obligate funds to a purchase without the requisite authority to do so. The provider shall establish procedures for handling unauthorized purchases with the following guidelines:

- (1) The chief administrative officer may ratify the unauthorized act of an employee who purchases or obligates funds to a purchase for amounts below \$500.
- (2) The chairman of the local DSN board's governing board must ratify unauthorized purchases above \$500.
- (3) The provider's chief administrative officer shall prepare a written report to the board chairman on the facts and circumstances, corrective action taken to prevent recurrence, action taken against the individual committing the unauthorized purchasing act, and documentation concerning whether or not the price paid was fair and reasonable. If the price paid is unreasonable, the individual may be held pecuniarily liable for the difference.

The provider shall establish appropriate disciplinary actions for employees who make unauthorized purchases.

G. Blanket Purchase Agreements (See Attachment B)

The provider may use blanket purchase agreements or purchase orders (BPO) for the direct procurement of small quantities of supplies and services. This may be accomplished by establishing charge account agreements with qualified suppliers. Normally, the items or services are those for which there is a recurring demand such as food preparation supplies, spare parts, and routine services for the repair of building systems, equipment, and vehicles. The following procedures shall be established for BPOs:

- (1) A separate blanket purchase order shall be issued for each supplier. The BPO and any attached agreement shall conform to guidelines set forth in Attachment B.
- (2) A single call (delivery or pickup) may not exceed \$300 unless accompanied by a separately identified purchase order signed by the authorized purchasing official.
- (3) Suppliers shall be notified immediately when a provider employee is no longer authorized to place calls or receive supplies or services.
- (4) Blanket purchase orders may not be issued in excess of a 12 month period. If renewed, a new purchase order, bearing a different purchase order number shall be issued.

H. Purchase Order Register

It is recommended that the providers purchasing regulations require maintenance of a register of all purchase orders issued to vendors or that the information listed below is readily available in provider records. This register would include the following information:

- (1) Number assigned the purchase order
- (2) Issue date of the purchase order
- (3) Name of vendor
- (4) Total dollar value of the purchase order at time of issue.

I. General Supply Procedures

The provider purchasing rules shall include the following requirements:

- (1) When supplies, equipment, and services related thereto are needed, it is recommended that the provider require the user to state his or her needs on a Request for Issue of Purchase Order form (requisition).
- (2) Personnel authorizing procurements are not authorized to certify receipt of goods or services, except under emergency situations.
- (3) Receiving, storage and distribution procedures at each provider site may vary somewhat due to differences in staff size, storage space limitations, distribution methods, geographical location, physical plant characteristics, and other cost effectiveness considerations. However, the following general procedures and practices represent minimum procedural requirements that must be established by every board:
 - a. Written operating procedures shall be maintained to guide personnel who receive, store, and distribute goods.
 - b. Procedures must include detailed instructions on the following subjects:
 - comparison of merchandise received with identity and quantity information on packing slips and with items ordered as shown on the receiving copy of a purchase order or other receiving file document;
 - inspection for damaged items on items of lower quality than specified;
 - documentation of delivery or pick up of goods by personnel authorized in writing by the appropriate director to certify receipt;
 - procedures for documentation of contractual services performed.

IX. PROPERTY DISPOSAL

The Boards should have a policy on the disposal of property to ensure no favoritism is shown in this area. Suggestions on how to handle this is to have a form that describes the item no longer needed. This form will require two signatures; one should be the Executive director or his/her designee and the chief finance officer. Information for the form will include description, acquisition price, current value (estimated) and condition. If

the item is no longer needed and considered junk, it should be put in the dumpster. It is not to be given to anyone. If the item has any value, allow all interested parties an opportunity to bid on it. These suggestions are offered to reduce confusion. If there is a policy in place, use it. If not create one.

X. APPROVAL OF POLICIES AND PROCEDURES

The provider's procurement policies and procedures shall be maintained as part of other board policies and procedures and shall be subject to review during program and financial audits and reviews. Any variance of the local board's policies and procedures from this procedural document shall be approved in writing by DDSN's Director of Procurement Services. It is not necessary for the provider to submit to DSN policies and procedures for approval. However, the DDSN Director of Procurement Services will provide assistance to the provider in developing and implementing procurement policies and will review documents upon request.

Bill Barfield
Deputy State Director
(Originator)

Eugene Laurent, Ph.D.
State Director
(Approved)

Summary:

These changes were approved to make the job of purchasing easier. All procurements should start with a requisition that explains exactly what the user needs or wants. Carefully reading each request will help reduce errors, complaints, and protest. Remember to take the time to listen to the end user. Get as many people involved in the purchase as you can. Always ask the end user to write their specifications and review them together. The number one thing that will cause an interruption in a bid solicitation is weak or insufficient specifications. Remember things like warranties, types of materials, deadlines, building permits, licenses, bonds and insurance. These items, if left unmentioned could cause problems later. Do not allow you're self to be rushed; it takes time to put a solicitation, get responses, evaluate the bids and make an award. After reviewing the specs, talk to several vendors and tell them you are putting out a bid for an item and ask for their suggestions. Get as much

information about the item you are trying to buy as possible.
Follow your written procedures, ask questions when not sure and
you will have a better chance at having a successful procurement.

ATTACHMENT A

PROCUREMENT EXEMPTIONS

1. Livestock, feed and veterinary supplies.
2. Articles for commercial sale by all governmental bodies.
3. Fresh fruits, vegetables, meats, fish, milk and eggs.
4. Published books, periodicals and technical pamphlets.
5. Postage.
6. Invoices for gas and electricity, water and sewer services provided by public utilities subject to rate regulation by the Public Service Commission.
7. U.S. Post Office box rentals.
8. Copyrighted educational films, filmstrips, slides and transparencies.
9. Oil company credit card purchases for gas, oil, and jet fuel charges only.
10. Professional dues and registration and membership fees.
11. Attorneys.
12. Certified public accountants and public accountants engaged to perform financial and/or compliance audits.
13. Hospital and medical clinic services.
14. Medical doctors and psychiatrists.
15. Optometrists.
16. Dentists.
17. Registered nurses.
18. Licensed practical nurses.
19. Investment counselors.
20. Clergy
21. Court reporters.

22. Expert witness services.
23. Furniture refurbishing services of the Department of Corrections.
24. Services and/or supplies provided by the Division of General Services to public procurement units.
25. Fuel oil and diesel oil; however, competition should be obtained whenever possible.
26. Actuaries.
27. Conference facilities.
28. Doctors of osteopathy.
29. Instructional training seminars offered by governmental bodies to state employees on a registration fee basis and those contractual consultant services necessary to provide the professional instruction for the seminars.
30. Physical therapist and physical therapy assistants.
31. Speech pathologists.
32. Occupational therapists.
33. Veterinary services customarily obtained on a fee basis rather than by competitive solicitation.
34. Appraisers.
35. Health maintenance organizations (HMOs).
36. Advertisements in professional journals or publications.
37. Advertising time or space in newspapers, radio or television.
38. License agreements for computer software after such software has been competitively bid as required by the Procurement Code.

ATTACHMENT B

A. ESTABLISHMENT OF BLANKET PURCHASE AGREEMENTS.

(1) GENERAL. A blanket purchase agreement is a simplified method of filling anticipated repetitive needs for small quantities of supplies or services by establishing "charge accounts" with qualified sources of supply. Blanket purchase agreements are designed to reduce administrative costs in accomplishing small purchases by eliminating the need for issuing individual purchase documents.

(2) ALTERNATE SOURCES. To the extent practicable, blanket purchase agreements for items of the same type should be placed concurrently with more than one supplier. All competitive sources shall be given an equal opportunity to furnish supplies or services under such agreements.

(3) TERMS AND CONDITIONS. Blanket purchase agreements shall contain the following provisions:

(a) Description of agreement-a statement that the supplier shall furnish supplies or services, described therein in general terms, if and when requested by the Procurement Officer, or his authorized representative, during a specified period and within a stipulated aggregate amount, if any. Blanket purchase agreements may encompass all items that the supplier is in a position to furnish.

(b) Extent of obligation-a statement that the provider is obligated only to the extent of authorized calls actually placed against the blanket purchase agreement.

(c) Notice of individuals authorized to place calls and dollar limitations-a provision that a list of names of individuals authorized to place calls under the agreement, identified by organizational component, and the dollar limitation per call for each individual shall be furnished to the supplier by the Procurement Officer.

(d) Delivery tickets-a requirement that all shipments under the agreement, except subscriptions and other charges for newspapers, magazines, or other periodicals, shall be accompanied by delivery tickets or sales slips which shall contain the following minimum information:

- (1) Name of supplier;
- (2) blanket purchase agreement number;
- (3) date of call;
- (4) call number;
- (5) itemized list of supplies or services furnished;
- (6) quantity, unit price, and extension of each item less applicable discounts (unit price and extensions need not be shown

when incompatible with the use of automated systems, provided that the invoice is itemized to show this information); and
(7) date of delivery or shipment.

(e) Invoices-one of the following statements:

(1) A summary invoice shall be submitted at least monthly or upon expiration of the blanket purchase agreement, whichever occurs first, for all deliveries made during a billing period, identifying the delivery tickets covered therein, stating their total dollar value, and supported by receipted copies of the delivery tickets; or

(2) An itemized invoice shall be submitted at least monthly or upon expiration of the blanket purchase agreement, whichever occurs first, for all deliveries made during a billing period and for which payment has not been received. Such invoices need not be supported by copies of delivery tickets;

(3) When billing procedures provide for an individual invoice for each delivery, these invoices shall be accumulated provided that a consolidated payment will be made for each specified period; and the period of any discounts will commence on final date of billing period or on the date of receipt of invoices for all deliveries accepted during the billing period, whichever is later. This procedure should not be used if the accumulation of the individual invoices materially increases the administrative costs of this purchase method.

(4) An invoice for subscriptions or other charges for newspapers, magazines, or other periodicals shall show the starting and ending dates and shall state either that orders have been placed in effect or will be placed in effect upon receipt of payment.

B. COMPETITION UNDER BLANKET PURCHASE AGREEMENT.

Calls against blanket purchase agreements shall be placed after prices are obtained. When concurrent agreements for similar items are in effect, calls shall be equitably distributed. In those instances where there is an insufficient number of BPAs for any given class of supplies or services to assure adequate competition, the individual placing the order shall solicit quotations from other sources.

C. CALLS AGAINST BLANKET PURCHASE AGREEMENT.

Calls against blanket purchase agreements generally will be made orally, except that informal correspondence may be used when ordering against agreements outside the local trade area. Documentation of calls shall be essential information. Forms may be developed for this purpose locally.

D. RECEIPT AND ACCEPTANCE OF SUPPLIES OR SERVICES.

Acceptance of supplies or services shall be indicated by signature and date on the appropriate form by the authorized representative after verification and notation of any exceptions. A sales slip or delivery ticket may be used for receipt and acceptance when purchases are retained for administration.

E. REVIEW PROCEDURES.

Blanket purchase agreements should be reviewed at least semi-annually to assure that authorized procedures are being followed. Blanket purchase agreements shall be issued for a period of no longer than 12 months.

APPENDIX A: Request for Quotes Instructions and Templates

Contents

Appendix A includes all of the materials and instructions one might need to conduct a procurement through the Request for Quotes procurement process. Beyond the solicitation itself there are several forms designed to successfully document the process. The instructions below provide a step by step explanation of not only the process itself, but also the reason each of these documents are used. For each of the documents necessary, a template has been included. A list of the documents included in this appendix is provided below. DDSN's Central Procurement Office is available to answer any questions you may have regarding this and other procurement procedures at (803) 898-9750.

Appendix Documents:

- <u>Request for Quotes Instructions</u>	P. 20
- <u>Request for Quotes Solicitation Template</u>	P. 28
- <u>Request for Quotes Amendment Template</u>	P. 32
- <u>Request for Quotes Verification Sheet</u>	P. 35
- <u>Quote Tally Sheet Template</u>	P. 36
- <u>Request for Quotes Award Template</u>	P. 37

APPENDIX A: Request for Quotes Instructions and Templates

Request for Quotes Instructions

This document provides a step-by-step explanation of the Request for Quotes Solicitation Template. Please note that those portions of documents highlighted in **Green** will need to be filled in while those in **Blue** may need to be altered depending on the type of solicitation being issued.

COVER PAGE

Solicitation Number:	Each Board may develop and use their own numbering system. A new solicitation number is not required for each amendment to a solicitation.
Date Printed:	This date should not precede the Issue Date.
Date Issued:	The date the solicitation or amendment was released. The date used for an amendment may differ from that of the original solicitation.
Procurement Officer:	Name of the individual preparing the solicitation documents. The name used on the Amendment should be the same as that used in the original solicitation. A phone number and e-mail address should be provided for those potential offerors that may have questions.
Description:	Simply a brief one or two sentence describing the work/goods to be provided.
E-Mail Address:	Include this if you wish to accept quotes via e-mail. The file types listed are common and should be readily recognized by any of the computers at the Boards. If a PDF file cannot be accessed, the necessary software can be downloaded for free at www.adobe.com . The software is called Adobe Acrobat Reader.
Length Offer Is Held:	By submitting a quote, the offeror is agreeing to hold their price for a given length of time. By default, this is set for thirty days. This value may be increased should you feel the need to do so. It should not be decreased below thirty days.

PAGE TWO

Contact Information:	This page provides the offeror with space to list all of their contact information including their office address and the location any notices (amendment and award documents), payment, or order information should be sent.
----------------------	---

APPENDIX A: Request for Quotes Instructions and Templates

Request for Quotes Instructions

Acknowledgement of Amendments:

If any amendments are issued, the offeror must note the amendment number and date of issue of each amendment issued on Page Two of the original solicitation. This information does not have to be included on the second page of the amendments themselves. This is to ensure that they are aware of any changes that may have been made in the scope of work so it can be guaranteed that each offeror is basing their price on the same criteria.

Discount For Prompt Payment:

Any offeror may provide incentives for early payment which they may note on the second page. These incentives must not be used to evaluate the quotes received; only the values on the Quote Schedule designated for that purpose.

South Carolina Resident Vendor Preference:

“the cost of an item from a resident vendor or an end-product made, manufactured, or grown in South Carolina is unreasonable if the bid exceeds by more than seven percent the lowest qualified bid on the same item or end-product which is made, manufactured, or grown in other states of the United States, or in a foreign country or territory.”

Preferences

Each is only used if one of the offerors claims one or more of the preferences. In the event that occurs, each applicable percentage is added to the quotes and/or individual items submitted by the bidders who ***did not*** claim the preference(s) as follows:

S.C Vendor	7 %	added to entire quote of vendors not claiming this preference.
S.C. End-Product	7 %	added to any items not claiming this preference.
S.C. Vendor and End-Product	10 %	added to entire quote of vendors not claiming this preference.
U.S. End-Product	2 %	added to any items not claiming this preference.

APPENDIX A: Request for Quotes Instructions and Templates

Request for Quotes Instructions

S.C. Vendor and U.S. End Product 9% added to entire quote of vendors not claiming both preferences.

The value used to evaluate the quotes received will be the quoted price plus any applicable percentage(s).

QUOTE SCHEDULE

Items

The item chart can be copied and pasted to account for each different item/service requested from the vendors. Should you wish to categorize several items, they may be grouped into lots. Example:

Lot A	Lot B
Item 1	Item 4
Item 2	Item 5
Item 3	Item 6

Commodity: The type of item or service requested.

Quantity: The amount requested.

Unit of Measure: Months, Each, etc.

Unit Price: This will be filled in by the offeror.

Extended Price: The unit price multiplied by the quantity. Will also be filled in by the offeror.

Description: Brief description of the item/service. This may help distinguish two like items listed in different item charts.

Should you wish for a breakdown of the price listed in any given item chart, you may include lines below it requesting inclusive costs such as materials and labor, or even the length of a manufacturer's warranty.

When more than one item is requested, a line should be included for the offeror to submit a total quote for all items requested. If lots are used, a line should be included to provide the total of each lot, followed by another line to provide a total value of all lots listed. There should always be one final line from which the Procurement Officer may evaluate the total price of a quote and it should be noted as such. An exception to this rule may occur when using lots to award to multiple vendors.

APPENDIX A: Request for Quotes Instructions and Templates

Request for Quotes Instructions

Use of lots: Lots are commonly used to increase competition by permitting several different offerors to be awarded portions of your total requested items. You may find that there are only a few companies that can provide two types of service and many that can provide one or the other. By permitting the award of these two items, or groups of items, you increase the number of companies that could submit a quote; increasing the chance of a lower total cost. In this case, you must specify precisely how you intend to make the award and which values on the Quote Schedule will be used in that evaluation.

Labor / Material Cost:	As described above, you may include additional lines for each offeror to breakdown their costs for each item. By default this template lists labor and material costs, though these may be removed or altered to fit the items or services you are purchasing.
SC End Product	This only applies when purchasing items or goods. It may be deleted when purchasing a service. This should be listed under each item chart for which it is applicable.
US End Product	See Above
Warranty	This may be used as applicable and you may want to specify whether to include the manufacturer or supplier's warranty. It cannot be used in determining award, but does allow this information to be obtained up front.
Professional Affiliation	This is optional; applying primarily to contractors performing work on-site (carpenters, plumbers, etc.). Collection of this information will assist in determining the ability of the offeror to perform the work (responsibility).
Insurance/Bonding	This applies primarily to contractor's performing work on-site.
References	This has also been included to help ensure that the contractor is capable of performing the work.
Note	This applies to the purchase of items or goods and should be listed at the end of the Quote Schedule; or if not applicable, removed. It states that the vendor must notify you 24 hours prior to making the delivery. F.O.B destination, freight pre-paid means that the vendor must

APPENDIX A: Request for Quotes Instructions and Templates

Request for Quotes Instructions

pay for the delivery and you do not take ownership of the items until they have arrived at your location. The vendor will be held liable for the items prior to this point, should they be damaged in route. All deliveries must also be made inside unless you specify otherwise. This information may be altered or removed as applicable, but will not hurt anything to be left in.

SPECIFICATIONS

This section will include a description of those goods or services to be purchased, as well any special requirements the offeror must adhere to. It is important to include as much detail as possible to ensure that your needs are met and that each vendor will be submitting a quote based on the same criteria. Any details of the items being purchased, or the manner in which services are to be provided, that is left out will be left to the discretion of the contractor(s) receiving the award.

SOLICITATION VERIFICATION SHEET - QUOTES

This document acts as a checklist to make sure that all of the correct documents have been included in the contract file. The sheet should be printed out prior to releasing the solicitation so that the list can be followed as you work through the solicitation process. As each item is placed in the contract file, this sheet will be initialed and dated. Some of the items on this list are applicable only in some circumstances and can be crossed out if not necessary.

SCBO ADVERTISEMENT

Solicitations must be advertised in South Carolina Business Opportunities if they are anticipated to cost more than \$10,000.00. If, upon receiving quotes that were verbally solicited, it is found that the lowest quote is *over* \$10,000.00 an award should not be made. A written solicitation (either a Request For Quote or Invitation For Bid) must be sent to at least three vendors, including those who submitted a quote previously, and then be advertised in SCBO.

In order to advertise a solicitation in SCBO, you must fill out the applicable SCBO Advertisement Form. These forms can be found online at SCBO's website: <http://www.mmo.sc.gov/MMO/ops/MMO-scbo-index.phtm>; or directly by clicking [here](#).

APPENDIX A: Request for Quotes Instructions and Templates

Request for Quotes Instructions

Once the form has been filled out, it should be e-mailed as an attachment to mlfowler@mmo.sc.gov. The e-mail should also include the date you wish to have the ad published.

SCBO is published each Monday and Thursday. For your ad to be published in the Monday edition, it must be submitted no later than noon Friday. Ads published on Thursday must be submitted no later than noon Wednesday.

The deadline for submitting a quote may not be less than seven days from the date the ad is to appear in SCBO.

AMENDMENTS

There are two circumstances under which an amendment would be issued.

- You wish to change any portion of the solicitation after it has been issued.

or

- You have received questions from vendors, without the answer to which, other vendors may be at a disadvantage when quoting a price.

For the most part, the first two pages of the amendment will be exactly the same as the Request For Quotes that was issued. In every circumstance, the date issued and amendment number will have to be altered. If the amendment is being issued to extend the submission date, then this too would be changed.

The third page of the amendment is where you will state the reason for its issuance. For Example:

- This amendment has been issued to extend the date by which to submit your offer to December 28, 2009 at 5:00 PM.

or

- The following questions have been received in response to this solicitation:

When listing questions received, you need only list the question that was asked and your reply. If a change in the Quote Schedule is necessary, then it can be recreated within the amendment by copying the item charts from the Request For Quote Template.

Each offeror submitting a quote after an amendment has been issued, must also send a copy of any amendments issued with the quote. This is to ensure that each vendor is submitting quotes based on the same criteria. They must also acknowledge their receipt on Page Two of the Request For Quotes.

APPENDIX A: Request for Quotes Instructions and Templates
Request for Quotes Instructions
QUOTE TALLY SHEET

Once the deadline for submission has passed, each of the quotes received are tallied on the Quote Tally Sheet. You need only enter the Solicitation Number, Title, and the date the tallying is being done before printing it out. The remainder can be filled out by hand.

For each quote, you simply write the name of the vendor, check the In-State Preference box if they have made such a declaration on Page Two of the Request For Quotes, and write the price being used for evaluation on the Quote Schedule under Price. If for any of those items the vendor has declared them to be either a SC-End Product or US-End Product, then you would check the appropriate boxes. If you have chosen to categorize the items requested into lots, you may need to alter this form to include the evaluated costs for each lot.

After tallying each of the quotes, you would then check to see if any of the preferences, should there be any, need to be applied. If so, you would adjust the price of those quotes accordingly and write the new price under Adjusted Price.

Once all of the prices have been tallied, the individual tallying the quotes will initial the bottom right of the sheet. A second individual should also initial the bottom right corner after reviewing the document for accuracy.

Award will be made to vendor with the lowest Adjusted Price. Should lots be used to allow for multiple awards, then you would award each lot independently based on its own Adjusted Price.

Prior to issuing a purchase order, an award must first be made by issuing a Solicitation Award Document. Aside from sending a copy of the Award Document to each offeror, a copy must also be sent to the Consumer being served.

SOLICITATION AWARD DOCUMENT - RFQ

Issuing an award requires only that the form be filled out and sent to each of the vendors who submitted an offer. Information to be filled in will come directly from the Request For Quote document that was issued or from any applicable amendment that may have changed it.

This document must be signed by the Executive Director of the Board prior to being mailed out.


When listing the final price, the total for the entire quote must be listed. If there are multiple lots or items, these may also be listed separately if you should wish to do so. If listing by item, you should include a description of each. You may provide the applicable terminology.

APPENDIX A: Request for Quotes Instructions and Templates

Request for Quotes Instructions

If awards are being made to multiple vendors it is necessary to list each vendor receiving an award and the corresponding lot to which they submitted a successful quote. Vendors should not be sent an award document showing only the portion of the contract they were awarded, but also who was awarded the portion for which they were not successful.

APPENDIX A: Request for Quotes Instructions and Templates
Request for Quotes Solicitation Template
COVER PAGE

	State of South Carolina Request For Quote	<table style="width: 100%;"> <tr><td>Solicitation Number</td><td style="background-color: black; color: black;">[REDACTED]</td></tr> <tr><td>Date Printed</td><td style="background-color: black; color: black;">[REDACTED]</td></tr> <tr><td>Date Issued</td><td style="background-color: black; color: black;">[REDACTED]</td></tr> <tr><td>Procurement Officer</td><td style="background-color: black; color: black;">[REDACTED]</td></tr> <tr><td>Phone</td><td style="background-color: black; color: black;">[REDACTED]</td></tr> <tr><td>E-Mail Address</td><td style="background-color: black; color: black;">[REDACTED]</td></tr> </table>	Solicitation Number	[REDACTED]	Date Printed	[REDACTED]	Date Issued	[REDACTED]	Procurement Officer	[REDACTED]	Phone	[REDACTED]	E-Mail Address	[REDACTED]
Solicitation Number	[REDACTED]													
Date Printed	[REDACTED]													
Date Issued	[REDACTED]													
Procurement Officer	[REDACTED]													
Phone	[REDACTED]													
E-Mail Address	[REDACTED]													

DESCRIPTION: [REDACTED]

USING GOVERNMENTAL UNIT: South Carolina Department of Disabilities and Special Needs [REDACTED] Board

The Term "Offer" Means Your "Quote."

SUBMIT OFFER BY (Date/Time): [REDACTED] **Date and Time**

NUMBER OF COPIES TO BE SUBMITTED: **Two**

SUBMIT YOUR OFFER TO EITHER OF THE FOLLOWING ADDRESSES, FAX NUMBER, OR E-MAIL ADDRESS:

MAILING ADDRESS: [REDACTED]	
PHYSICAL ADDRESS: [REDACTED]	
FAX NUMBER: [REDACTED]	ATTN: [REDACTED]
E-MAIL ADDRESS: [REDACTED]	Please include solicitation number in the subject line. Necessary documents must be scanned and included as an attachment in either PDF or JPEG file formats.

You must submit a signed copy of this form with Your Offer. By submitting an offer, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the submission deadline.

NAME OF OFFEROR <small>(Full legal name of business submitting the offer)</small>	
AUTHORIZED SIGNATURE <small>(Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)</small>	DATE SIGNED
TITLE <small>(Business title of person signing above)</small>	
PRINTED NAME <small>(Printed name of person signing above)</small>	
Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the offeror above. An offer may be submitted by only one legal entity. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, <i>i.e.</i> , a separate corporation, partnership, sole proprietorship, etc.	
STATE OF INCORPORATION <small>(If offeror is a corporation, identify the state of Incorporation.)</small>	
TAXPAYER IDENTIFICATION NO.	BUSINESS LICENSE NO.

If an item cannot be furnished, please indicate "No Quote" in the Quote Schedule and return this solicitation by one of the methods of submission defined above.

(Return Cover Page, Page Two, and the Quote Schedule with your Offer)

APPENDIX A: Request for Quotes Instructions and Templates
Request for Quotes Solicitation Template
PAGE TWO

HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.)							
	Area Code	Number	Extension	Facsimile				
	E-mail Address							
PAYMENT ADDRESS (Address to which payments will be sent.)	ORDER ADDRESS (Address to which purchase orders will be sent)							
<input type="checkbox"/> Payment Address same as Home Office Address <input type="checkbox"/> Payment Address same as Notice Address (check only one)		<input type="checkbox"/> Order Address same as Home Office Address <input type="checkbox"/> Order Address same as Notice Address (check only one)						
ACKNOWLEDGMENT OF AMENDMENTS Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue.	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date
DISCOUNT FOR PROMPT PAYMENT	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	____ Calendar Days (%)				
PREFERENCES – SC RESIDENT VENDOR PREFERENCE (June 2005): Section 11-35-1524 provides a preference for offerors that qualify as a resident vendor. A resident vendor is an offeror that (a) is authorized to transact business within South Carolina, (b) maintains an office* in South Carolina, (c) either (1) maintains a minimum \$10,000.00 representative inventory at the time of the solicitation, or (2) is a manufacturer which is headquartered and has at least a ten million dollar payroll in South Carolina, and the product is made or processed from raw materials into a finished end-product by such manufacturer or an affiliate (as defined in section 1563 of the Internal Revenue Code) of such manufacturer, and (d) has paid all assessed taxes. If applicable, preference will be applied as required by law.					OFFERORS REQUESTING THIS PREFERENCE MUST INITIAL HERE. _____ *ADDRESS AND PHONE OF IN-STATE OFFICE <input type="checkbox"/> In-State Office Address same as Home Office Address <input type="checkbox"/> In-State Office Address same as Notice Address <div style="text-align: right;">(CHECK ONLY ONE)</div>			
PREFERENCES – SC/US END-PRODUCT (June 2005): Section 11-35-1524 provides a preference to vendors offering South Carolina end-products or US end-products, if those products are made, manufactured, or grown in SC or the US, respectively. An end-product is the item identified for acquisition in this solicitation, including all component parts in final form and ready for the use intended. The terms “made,” “manufactured,” and “grown” are defined by Section 11-35-1524(B). By signing your offer and checking the appropriate space(s) provided and identified on the bid schedule, offeror certifies that the end-product(s) is either made, manufactured or grown in South Carolina, or other states of the United States, as applicable. Preference will be applied as required by law.					IF THIS PREFERENCE APPLIES TO THIS PROCUREMENT, PART VII (BIDDING SCHEDULE) WILL INCLUDE A PLACE TO CLAIM THE PREFERENCE. OFFERORS REQUESTING THIS PREFERENCE MUST CHECK THE APPROPRIATE SPACES ON THE BIDDING SCHEDULE.			

CONTRACTOR'S LICENCE NUMBER: _____
 LICENCING ENTITY: _____ LICENCE TYPE: _____

(Return Cover Page, Page Two, and the Quote Schedule with your Offer)

APPENDIX A: Request for Quotes Instructions and Templates
Request for Quotes Solicitation Template
QUOTE SCHEDULE

Agency Req.:					
Item	Commodity	Quantity	Unit Of Measure	Unit Price	Extended Price
1					
Description:					

DELIVERY FEE: \$

LABOR COST: \$

MATERIALS COST: \$

SC END PRODUCT YES NO US END PRODUCT YES NO

WARRANTY:

PARTS:

LABOR:

PLEASE LIST THE NAME(S) OF ANY PROFESSIONAL AFFILIATIONS (LOCAL CHAMER, CONTRACTOR'S ASSOCIATION, ETC.):

DO YOU HAVE INSURANCE OR ARE BONDED TO COVER THE TYPE OF WORK DESCRIBED BELOW? IF YES, PLEASE ATTACH PROOF OF SUCH TO THIS QUOTE. YES NO

PLEASE ATTACH TO THIS QUOTE A LIST OF THREE REFERENCES FOR WHICH YOU HAVE SUCCESSFULLY COMPLETED WORK OF AN EQUIVALENT TYPE AND SCOPE.

Note: Successful vendor must notify receiving section 24 hours prior to delivery. All deliveries will be F.O.B. destination, freight pre-paid. Unless otherwise noted, inside delivery will be provided.


APPENDIX A: Request for Quotes Instructions and Templates
Request for Quotes Solicitation Template
SPECIFICATIONS

INSERT ANY SPECIFICATIONS IN THIS SECTION

YOU MAY ALSO INCLUDE SPECIFICATIONS AS AN ATTACHMENT,
THOUGH THEY SHOULD BE REFERENCED IN THIS SECTION

APPENDIX A: Request for Quotes Instructions and Templates

Request for Quotes Amendment Template

	State of South Carolina Amendment No. [REDACTED]	Solicitation Number	[REDACTED]
		Date Printed	[REDACTED]
		Date Issued	[REDACTED]
		Procurement Officer	[REDACTED]
		Phone	[REDACTED]
		E-Mail Address	[REDACTED]

DESCRIPTION: [REDACTED] SAME AS ON REQUEST FOR QUOTE

USING GOVERNMENTAL UNIT: South Carolina Department of Disabilities and Special Needs [REDACTED] Board

The Term "Offer" Means Your "Quote."

SUBMIT OFFER BY (Date/Time): [REDACTED] Date and Time

NUMBER OF COPIES TO BE SUBMITTED: **Two**

SUBMIT YOUR OFFER TO EITHER OF THE FOLLOWING ADDRESSES, FAX NUMBER, OR E-MAIL ADDRESS:

MAILING ADDRESS:

PHYSICAL ADDRESS:

FAX NUMBER:

E-MAIL ADDRESS:

ATTN:

Please include solicitation number in the subject line.

Necessary documents must be scanned and included as an attachment in either PDF or JPEG file formats.

<p>You must submit a signed copy of this form with Your Offer. By submitting an offer, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the submission deadline.</p>	
NAME OF OFFEROR <small>(Full legal name of business submitting the offer)</small>	
AUTHORIZED SIGNATURE <small>(Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)</small>	DATE SIGNED
TITLE <small>(Business title of person signing above)</small>	
PRINTED NAME <small>(Printed name of person signing above)</small>	
Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the offeror above. An offer may be submitted by only one legal entity. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, <i>i.e.</i> , a separate corporation, partnership, sole proprietorship, etc.	
STATE OF INCORPORATION <small>(If offeror is a corporation, identify the state of Incorporation.)</small>	
TAXPAYER IDENTIFICATION NO.	BUSINESS LICENSE NO.

If an item cannot be furnished, please indicate "No Quote" in the Quote Schedule and return this solicitation by one of the methods of submission defined above.

APPENDIX A: Request for Quotes Instructions and Templates

Request for Quotes Amendment Template

HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)		NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.)						
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Area Code</td> <td style="width: 25%;">Number</td> <td style="width: 25%;">Extension</td> <td style="width: 25%;">Facsimile</td> </tr> </table>		Area Code	Number	Extension	Facsimile	
Area Code	Number	Extension	Facsimile					
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>E-mail Address</td> </tr> </table>		E-mail Address				
E-mail Address								
PAYMENT ADDRESS (Address to which payments will be sent.)		ORDER ADDRESS (Address to which purchase orders will be sent)						
<input type="checkbox"/> Payment Address same as Home Office Address <input type="checkbox"/> Payment Address same as Notice Address (check only one)		<input type="checkbox"/> Order Address same as Home Office Address <input type="checkbox"/> Order Address same as Notice Address (check only one)						
ACKNOWLEDGMENT OF AMENDMENTS Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue.	Amendment t No.	Amendment Issue Date	Amendment t No.	Amendment Issue Date	Amendment No.	Amendment t Issue Date	Amendment No.	Amendment Issue Date
DISCOUNT FOR PROMPT PAYMENT		10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	____ Calendar Days (%)			
PREFERENCES – SC RESIDENT VENDOR PREFERENCE (June 2005): Section 11-35-1524 provides a preference for offerors that qualify as a resident vendor. A resident vendor is an offeror that (a) is authorized to transact business within South Carolina, (b) maintains an office* in South Carolina, (c) either (1) maintains a minimum \$10,000.00 representative inventory at the time of the solicitation, or (2) is a manufacturer which is headquartered and has at least a ten million dollar payroll in South Carolina, and the product is made or processed from raw materials into a finished end-product by such manufacturer or an affiliate (as defined in section 1563 of the Internal Revenue Code) of such manufacturer, and (d) has paid all assessed taxes. If applicable, preference will be applied as required by law.					OFFERORS REQUESTING THIS PREFERENCE MUST INITIAL HERE. _____ *ADDRESS AND PHONE OF IN-STATE OFFICE <input type="checkbox"/> In-State Office Address same as Home Office Address <input type="checkbox"/> In-State Office Address same as Notice Address <div style="text-align: right;">(CHECK ONLY ONE)</div>			
PREFERENCES – SC/US END-PRODUCT (June 2005): Section 11-35-1524 provides a preference to vendors offering South Carolina end-products or US end-products, if those products are made, manufactured, or grown in SC or the US, respectively. An end-product is the item identified for acquisition in this solicitation, including all component parts in final form and ready for the use intended. The terms “made,” “manufactured,” and “grown” are defined by Section 11-35-1524(B). By signing your offer and checking the appropriate space(s) provided and identified on the bid schedule, offeror certifies that the end-product(s) is either made, manufactured or grown in South Carolina, or other states of the United States, as applicable. Preference will be applied as required by law.					IF THIS PREFERENCE APPLIES TO THIS PROCUREMENT, PART VII (BIDDING SCHEDULE) WILL INCLUDE A PLACE TO CLAIM THE PREFERENCE. OFFERORS REQUESTING THIS PREFERENCE MUST CHECK THE APPROPRIATE SPACES ON THE BIDDING SCHEDULE.			

APPENDIX A: Request for Quotes Instructions and Templates
Request for Quotes Amendment Template

ENTER AMENDMENT DETAILS HERE

ATTACHEMENTS MAY BE ADDED THOUGH
THEY MUST BE REFERENCED IN THIS SPACE

APPENDIX A: Request for Quotes Instructions and Templates
Request for Quotes Verification Sheet
Solicitation Verification Sheet - Quotes

Solicitation #: [REDACTED]

Solicitation Title: [REDACTED]

Vendor: OPTIONAL-FILL OUT AFTER AWARD

Item	Verified By	Date
Purchasing Requisition		
SCBO Advertisement (When anticipated cost is above \$10,000)		
Vendor List		
Purchase Order		
Invitation to Quote		
Amendment(s) (If Applicable)		
Quote Tally Sheet		
Certificate of Liability Insurance (If Applicable)		
Complete Quote Package Sent to DDSN		

APPENDIX A: Request for Quotes Instructions and Templates
Quote Tally Sheet
SOUTH CAROLINA DEPARTMENT OF DISABILITIES AND SPECIAL NEEDS
(Name of Board)
Quote Tally Sheet

SOLICITATION NUMBER: _____ SOLICITATION TITLE: _____ DATE: _____

VENDOR	In-State Preference	S.C. End-Product	U.S. End-Product	Adjusted Price	Price				

Opened By: _____

Witnessed By: _____

APPENDIX A: Request for Quotes Instructions and Templates
Request for Quotes Award Template

SOUTH CAROLINA DEPARTMENT OF DISABILITIES AND SPECIAL NEEDS

(BOARD NAME)

STATEMENT OF CONTRACT AWARD

SOLICITATION NUMBER: [REDACTED]

SOLICATION TITLE: [REDACTED]

SOLICITATION ISSUE DATE: [REDACTED]

SUBMISSION DEADLINE: [REDACTED]

AWARD DATE: [REDACTED]

Executive Director

(Board Name)

AWARD(S) ARE MADE TO THE FOLLOWING:

VENDOR: [REDACTED]
[REDACTED]
[REDACTED]

Lot A/Total Price \$ [REDACTED]

Start Date: [REDACTED]

AWARD NOTES:

1. USING REGION WILL ISSUE ALL PURCHASE ORDERS FOR THIS CONTRACT.
2. REFER TO ORIGINAL SOLICITATION DOCUMENT FOR APPLICABLE OPTION TO EXTEND REQUIREMENTS.
3. TAX IS NOT INCLUDED IN THIS AWARD. APPLICABLE TAXES MAY BE ADDED TO INVOICE(S).
4. RIGHTS OF PROTEST- ANY PROSPECTIVE BIDDER, OFFEROR, CONTRACTOR OR SUBCONTRACTOR WHO BELIEVES THAT THEY HAVE BEEN AGGRIEVED IN CONNECTION WITH THIS SOLICITATION OR SUBSEQUENT AWARD OF A CONTRACT, SHALL EXERCISE THEIR RIGHT TO PROTEST AS SET FORTH. UNDER SECTION 11-35-4210 OF THE SOUTH CAROLINA CONSOLIDATED PROCUREMENT CODE AND ANY REVISIONS THEREOF.
5. QUOTES RECEIVED AT LESS THAN THAT OF AWARD WERE REJECTED AS THEY DID NOT MEET ADVERTISTED SPECIFICATIONS OR REQUESTED AND RECEIVED APPROVAL FOR THEIR QUOTE TO BE WITHDRAWN.

cc: Consumer
DDSN
Vendor

APPENDIX B: Invitation for Bids Instructions and Templates

Invitation for Bids Contents

Appendix B includes all of the materials and instructions one might need to conduct a procurement through the Invitation for Bids procurement process. Beyond the solicitation itself there are several forms designed to successfully document the process. The instructions below provide a step by step explanation of not only the process itself, but also the reason each of these documents are used. For each of the documents necessary, a template has been included. A list of the documents included in this appendix is provided below. DDSN's Central Procurement Office is available to answer any questions you may have regarding this and other procurement procedures at (803) 898-9750.

Appendix Documents:

- <u>Invitation for Bids Instructions</u>	P. 39
- <u>Invitation for Bids Solicitation Template</u>	P. 51
- <u>Invitation for Bids Amendment Template</u>	P. 60
- <u>Invitation for Bids Verification Sheet</u>	P. 63
- <u>Bid Tally Sheet</u>	P. 64
- <u>Invitation for Bid Award Template</u>	P. 65

APPENDIX B: Invitation for Bids Instructions and Templates

Invitation for Bids Instructions

Sealed Bidding Process

Overview

The Invitation for Bids is bound by the competitive sealed bidding procedures of both the Procurement Code and accompanying Regulations. Adhering closely to these procedures will result both in a more sound contract and reduce the likelihood of protests. Below is a set of general guidelines to assist you in this process. DDSN's Central Procurement Office is available to provide assistance or answer your questions at any time. Please do not hesitate to call us at (803) 898-9750.

General Guidelines

Receipt of Bids	As bids are submitted, you must keep them sealed and in a secure location until the time designated for bid opening has arrived.
Bid Opening	The bid opening must be public and at least one witness present. You must read aloud the name of each vendor and the amount bid. This information is then written on the Bid Tally Sheet which must be held open be open to public inspection after all bids have been opened.
Bid Evaluation	You must evaluate the bids in the manner you have defined in the Invitation for Bids. This will always be done on the basis of price however you may specify that there be one or multiple awardees. The solicitation must define precisely which values you intend to use in your evaluation.
Responsive and Responsible:	Award should only be made to bidders that are both responsive and responsible. A responsive bidder is one who has submitted all required documentation in the manner defined in the Invitation for Bids. A responsible bidder is one whom you have determined is capable of performing the work.
Discussions with Bidders:	Following the bid opening, and prior to award, you may contact bidders in order to obtain clarification regarding their bids. You may also enter into negotiations with the apparent low bidder to allow them to lower their price further. Any such discussions should be documented as part of the contract file.
Award:	Prior to issuing a purchase order, you must first issue an award statement. This must be posted in the location you have designated on the Cover Page of the Invitation for Bids and a copy sent to each of the bidders, the client being

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served by the procurement, and to DDSN. Award must always be made to the bidder with the lowest evaluated price who is both responsive and responsible.

Invitation for Bids Template

Template Overview

The Invitation for Bids Template includes the basic framework to develop your solicitation though it will be up to you to fill in the most crucial information. Each section is explained below. You will quickly notice that various portions of the Template have been highlighted in one of three colors. The scheme works as follows:

Green

areas are blanks to be filled in.

Blue

areas are in place to bring attention to portions of the solicitation that may need to be altered. Depending on the procurement, these statements may either need to be removed or swapped out for something more applicable.

Yellow

areas are notes that *should not* remain in the solicitation when it is issued. You must be sure to delete these comments before releasing your solicitation.

Cover Page

The first page of the Invitation for Bid is one of three items that will need to be returned with each bid (The others are “Page Two” and the “Bidding Schedule / Price-Business Proposal”). It provides important information regarding the solicitation such as contact/meeting information and the location and time of bid opening. Attention must be paid to each of the items below:

Solicitation Number:	You may create your own numbering system for each of your solicitations. This must be a unique value.
Date Printed:	The form is setup to display the current date each time the document is opened.
Date Issued:	This is the date this document was first posted or released.
Procurement Officer:	The individual preparing this document and overseeing the bidding process.
Phone:	The telephone number by which the Procurement Officer may be reached.
E-Mail Address	The e-mail address by which the procurement officer can be reached. This

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address must be monitored closely for questions that will be submitted by potential offerors and which must be answered quickly.

Description:	This is simply a one or two sentence description of the item(s) or service(s) to be provided and where.
Using Governmental Unit:	Enter the name of the Board.
Submit Offer By:	This must include both a date and a time for bid submission. This is an absolute deadline though it can be extended through the issuance of an amendment. We recommend this be no less than twenty-one days after the solicitation is advertised in SCBO.
Questions Must Be Received By:	<p>You may include a deadline for prospective offerors to submit their questions. Once this deadline has passed, each question should be answered and included in an amendment and sent to all who received a copy of this solicitation.</p> <p>If a date is entered here, then the Bid Opening date may not be less than twelve days after the solicitation is advertised in SCBO.</p> <p>If a date is not entered here, then any questions must be received in writing no later than five days prior to the bid opening. Read clause QUESTIONS FROM OFFERORS in the Invitation for Bids Template for clarification.</p>
Address(es) For Offer Submission:	Include the address(es) where the bids may be delivered. The physical address is the location where the bid opening will occur. The inclusion of this address is mandatory to allow both for the public to attend the bid opening and to allow for hand delivery of bids. If there is not a separate mailing

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address, such as a Post Office Box, then this portion may be removed.

Conference Type/Date/Location: Should you wish to hold either a site visit or pre-bid meeting, you may provide the appropriate information here. If these are to be held, then this information must be advertised in SCBO along with the solicitation itself. The deadline to receive questions should be after this date so bidders can ask follow-on questions.

Award & Amendments: It is important to note that the award and amendments must be posted for public viewing. It is highly recommended that this be the location where the bid opening is to take place. Regardless of where, the location must be defined in this space.

Page Two

This is the second of three items that must be returned with each bid (The others are the “Cover Page” and the “Bidding Schedule / Price-Business Proposal”). This page provides important information about the individual or entity submitting the bid, their acknowledgement of any issued amendments, and their requests for any applicable preferences. Below are some items to note:

Acknowledgment of Amendments: If you have issued an amendment following the release of your solicitation, each bidder must indicate that they received the amendment on this page. In addition, a copy of each amendment should also be submitted with their bid.

Preferences: If requesting the SC Resident Vendor Preference, the bidder will fill in the applicable section on Page Two. In order to request SC/US End-Product Preferences, they will have to note that below each item for which they are requesting the preference on the Bidding Schedule. This applies only to items and not services. You must provide a place for both the US and SC End-Product preferences under each item of the bid schedule manually. For individual

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descriptions of each preference, please see the section covering the Bid Tally Sheet.

Scope of Solicitation

In this section there are two primary pieces of information that must be included. First is a short description of the items/services to be provided, the location, and for whom (the Board). An estimated contract period should also be included. If you are making a one-time purchase of supplies, you may only need to include an estimated start date. The start date for any contract will be stated on the Award Document.

Terms, Conditions, and Instructions to Offerors

This section provides a selection of clauses that primarily cover the bidding process and instructs each offeror on how to submit their bids. It is important to read this section prior to releasing a solicitation as it governs both the actions of the bidder and procurement officer.

The end of this section is highly important. You must define how offerors will be allowed to submit their offer. Some questions to consider:

- If the bid schedule includes several items, must a bid be submit for all items?
- If the items on the bid schedule are grouped (Lots), must a bid be submitted for all groups or just some?

Any offeror who does not submit their bid in accordance with your defined method of submission may be deemed non-responsive.

Scope of Work / Specifications

This section will include a description of those goods or services to be purchased, as well any special requirements the offeror must adhere to. It is important to include as much detail as possible to ensure that your needs are met and that each vendor will be submitting a bid based on the same criteria. Any details of the items being purchased, or the manner in which services are to be provided, that is left out will be left to the discretion of the contractor(s) receiving the award.

Information for Offerors To Submit

If you require bidders to submit any additional information with their bids, it should be noted here. Be careful when mandating that information must be included as bidders not providing the information may be disqualified as non-responsive even though the may otherwise be capable of providing good products and service. A couple of optional items have been included by default. They are described below:

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Professional Affiliation	This is optional; applying primarily to contractors performing work on-site (carpenters, plumbers, etc.). Collection of this information will assist in determining the ability of the offeror to perform the work (responsibility).
Insurance/Bonding	This applies primarily to contractors performing work on-site.
References	This has also been included to help ensure that the contractor is capable of performing the work.

Qualifications

Any minimum qualifications for bidders must be met here. Documentation supporting such qualifications should be requested in the section above. As in the previous section, it is important not to make the requirements so stringent that it will greatly reduce the field of potential offerors.

Award Criteria

This section of the solicitation is absolutely critical as you must define how you will determine which bidder(s) will receive an award. In filling out this section you may consider the following questions:

- Will you only award to one vendor or possibly several?
- If several, will you award separately for each individual item on the bid schedule, or for groups of items (Lots)?

Bidding Schedule / Price-Business Proposal

Items The item chart can be copied and pasted to account for each different item/service requested from the vendors. The format of this section will be largely dictated by how you have stated offers be submitted and how you have defined the award criteria.

Should you wish to categorize several items, they may be grouped into lots. Example:

Lot A	Lot B
Item 1	Item 4
Item 2	Item 5
Item 3	Item 6

Commodity:	The type of item or service requested.
Quantity:	The amount requested.
Unit of Measure:	Months, Each, Gallons, etc.
Unit Price:	This will be filled in by the offeror.

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Extended Price: The unit price multiplied by the quantity.
Will also be filled in by the offeror.

Description: Brief description of the item/service.
This may help distinguish two like items
listed in different item charts.

Should you wish for a breakdown of the price listed in any given item chart, you may include lines below it requesting inclusive costs such as materials and labor, or even the length of a manufacturer's warranty.

If you intend to award to only one vendor, then it is important to include one final line for each bidder to provide a total price of their bid. This line should be designated as the one to be used for evaluation and specify how the bidders are to arrive at that figure. For example, "Sum of the Price of items 1, 2, and 3." If you have allowed for multiple awardees, then you should include several such lines in accordance with the award criteria.

Use of lots: Lots are commonly used to increase competition by permitting several different offerors to be awarded portions of your total requested items. You may find that there are only a few companies that can provide two types of service and many that can provide one or the other. By permitting the award of these two items, or groups of items, you increase the number of companies that could submit a bid; increasing the chance of a lower total cost. In this case, you must specify precisely how you intend to make the award and which values on the Bid Schedule will be used in that evaluation.

Labor / Material Cost: As described above, you may include additional lines for each offeror to breakdown their costs for each item. By default this template lists labor and material costs, though these may be removed or altered to fit the items or services you are purchasing.

SC End Product This only applies when purchasing items or goods. It may be deleted when purchasing a service. This must be listed under each item chart for which it is applicable.

US End Product See Above

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Warranty	This may be used as applicable and you may want to specify whether to include the manufacturer or supplier's warranty. It cannot be used in determining award, but does allow this information to be obtained up front.
Note	This applies to the purchase of items or goods and should be listed at the end of the Bid Schedule; or if not applicable, removed. It states that the vendor must notify you 24 hours prior to making the delivery. F.O.B destination, freight pre-paid means that the vendor must pay for the delivery and you do not take ownership of the items until they have arrived at your location. The vendor will be held liable for the items prior to this point, should they be damaged in route. All deliveries must also be made inside unless you specify otherwise. This information may be altered or removed as applicable, but will not hurt anything to be left in.

Attachments To Solicitation

By default, there are three documents attached to each Invitation for Bid. Two include tax information for the offerors and the third is a checklist to help ensure the bidders include all necessary information with their bids. You are free too add whatever other items you feel may be necessary. This may include items such as plans, details regarding anticipated usage of items or services, or simply directions to the Board. These items that are attached should be noted in this section in addition to the three that exist already.

Solicitation Verification Sheet – IFB

This document acts as a checklist to make sure that all of the correct documents have been included in the contract file. The sheet should be printed out prior to releasing the solicitation so that the list can be followed as you work through the solicitation process. As each item is placed in the contract file, this sheet will be initialed and dated. Some of the items on this list are applicable only in some circumstances and can be crossed out if not necessary.

SCBO Advertisement

Any Invitation for Bid must be advertised in South Carolina Business. In order to advertise a solicitation in SCBO, you must fill out the applicable SCBO Advertisement Form. These forms can be found online at SCBO's website: <http://www.mmo.sc.gov/MMO/ops/MMO-scbo-index.phtm>; or directly by clicking [here](#).

Once the form has been filled out, it should be e-mailed as an attachment to mlfowler@mmo.sc.gov. The e-mail should also include the date you wish to have the ad published.

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SCBO is published each Monday and Thursday. For your ad to be published in the Monday edition, it must be submitted no later than noon Friday. Ads published on Thursday must be submitted no later than noon Wednesday.

The bid opening may not take place any sooner than seven days after the ad has been published in SCBO. If you include a deadline for questions to be submitted, the bid opening may not take place any sooner than twelve days after the ad has been published.

Amendments

There are two circumstances under which an amendment would be issued.

- You wish to change any portion of the solicitation after it has been issued.

or

- You have received questions from vendors, without the answer to which, other vendors may be at a disadvantage when quoting a price.

For the most part, the first two pages of the amendment will be exactly the same as the Invitation for Bids that was issued. In every circumstance, the date issued and amendment number will have to be altered. If the amendment is being issued to extend the submission date, then this too would be changed.

The third page of the amendment is where you will state the reason for its issuance. For Example:

- This amendment has been issued to extend the date by which to submit your offer to December 28, 2009 at 5:00 PM.

or

- The following questions have been received in response to this solicitation:

When listing questions received, you need only list the question that was asked and your reply. If a change in the Bid Schedule is necessary, then it can be recreated within the amendment by copying the item charts from the Invitation for Bids Template.

Each offeror submitting a bid after an amendment has been issued, must also send a copy of those amendments issued with the bid. This is to ensure that each vendor is submitting bids based on the same criteria. They must also acknowledge their receipt on Page Two of the Invitation for Bids.

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Bid Tally Sheet

Prior to the bid opening, the solicitation number, title, and bid opening date should be entered into the Bid Tally Sheet, which then should be printed out. It can be customized based on the way your Bid Schedule is designed. By default it lists item numbers however, should you have grouped the Bid Schedule into lots, you may want to change the sheet to reflect this.

Once the time for bid opening has arrived, the procurement officer will announce that the bid opening has commenced and that no additional bids will be accepted. Each bid will then be opened with the procurement officer reading aloud the name of each vendor, the total of their bid, and any other important information that must be taken note of (such as whether or not each vendor applied for any state or end product preferences). As each bid is read aloud, either the procurement officer or the witness will write down this information on the Bid Tally Sheet.

If a bidder has declared an In-State Preference, this will be noted on Page Two of the solicitation at which time the appropriate box on the Bid Tally Sheet would be checked. To declare either of the End Product preferences, the bidder must have noted this under each item on the Bid Schedule.

Once all of the bids have been recorded, the total evaluated price should be written down on the Bid Tally Sheet under Price. This value should always be defined on the Bid Schedule. At this point you will conclude the bid opening. Both the procurement officer and the witness will initial the bottom right corner. After this has been done, you must make the Bid Tally Sheet available for any members of the public present to inspect it.

Following the bid opening, you will begin evaluating the bids first by calculating the Adjusted Price for each bid according to the preferences declared. A summary of theses is provided below:

Preferences	Each is only used if one of the bidders claims one or more of the preferences. In the event that occurs, each applicable percentage is added to the bids and/or individual items submitted by the bidders who <i>did not</i> claim the preference(s) as follows:
S.C Vendor	7 % added to entire bid of vendors <i>not</i> claiming this preference.
S.C. End-Product	7 % added to any items <i>not</i> claiming this preference.
S.C. Vendor and End-Product	10 % added to entire bid of vendors <i>not</i> claiming this preference.

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U.S. End-Product	2 %	added to any items <i>not</i> claiming this preference.
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S.C. Vendor and U.S. End Product	9%	added to entire bid of vendors <i>not</i> claiming both preferences.
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The value used to evaluate the bids received will be the price bid plus any applicable percentage(s).

Award will then be made to vendor with the lowest Adjusted Price that has also been determined to be both Responsive and Responsible. Should lots be used to allow for multiple awards, then you would award each lot independently based on its own Adjusted Price.

Note that you do have the option of making the award at the time of Bid Opening. If an award is made at the time of Bid Opening, then the Award Document should be released the same day and in the location stated on the Cover Page of the Invitation for Bids. Otherwise, award will be made whenever the Award Document is issued. Only after an Award Document has been issued can a purchase order be issued.

Solicitation Award Document – IFB

Issuing an award requires only that the form be filled out and sent to each of the vendors who submitted an offer. Information to be filled in will come directly from the Invitation for Bids and Bid Tally Sheet documents that were completed prior to this step.

When listing the final price, the total for the entire bid must be listed. If there are multiple lots or items, these may also be listed separately if you should wish to do so. If listing by item, you should include a description of each. You may provide the applicable terminology.

Also important to include is the total potential length and total potential value of the contract. Although the length of any individual contract term can be no longer than one year, you can provide options to renew the contract for up to four additional one-year terms. In these cases, you must list the full range of dates that the contract may potentially cover. Similarly, you should include the total potential cost of the contract should it last for that entire period. Below is an example of total potential cost:

1 year contract with four one-year options to renew that costs \$12,000.00 / year.

Because the contract could potentially last five total years, the total potential cost would be \$60,000.00.

If awards are being made to multiple vendors it is necessary to list each vendor receiving an award and the corresponding lot to which they submitted a successful bid. Vendors

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should not be sent an award document showing only the portion of the contract they were awarded, rather it should also include who was awarded the portion for which they were not successful.

The award statement must be mailed to each vendor who submitted a bid in response to the solicitation in addition to being posted in the location defined on the Cover Page of the Invitation for Bids. This document must be signed by the Executive Director of the Board prior to being posted or mailed. Aside from sending a copy of the Award Document to each offeror, a copy must also be sent to the Consumer being served.

Once this document has been issued, the solicitation process is complete and you are free to issue your purchase order(s).

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Invitation for Bids Solicitation Template

	State of South Carolina Invitation for Bid	Solicitation Number	
		Date Printed	7/20/2009
		Date Issued	
		Procurement Officer	
		Phone	
		E-Mail Address	

DESCRIPTION:

USING GOVERNMENTAL UNIT: Board Name

The Term "Offer" Means Your "Bid".

SUBMIT OFFER BY (Opening Date/Time): Date and Time See "Deadline For Submission Of Offer" provision

QUESTIONS MUST BE RECEIVED BY: Date and Time See "Questions From Offerors" provision

NUMBER OF COPIES TO BE SUBMITTED: **One (1) original and One (1) copy (marked 'copy')**

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

MAILING ADDRESS:

PHYSICAL ADDRESS:

See "Submitting Your Offer" provision

CONFERENCE TYPE: <u></u> DATE & TIME: <u></u>	LOCATION: <u></u>
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AWARD & AMENDMENTS	The award, this solicitation, and any amendments to this solicitation will be publicly displayed at the bid opening location (Physical Address Above) on the date award is made.
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You must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the Opening Date.

NAME OF OFFEROR <small>(Full legal name of business submitting the offer)</small>		OFFEROR'S TYPE OF ENTITY: <small>(Check one)</small> <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local) <input type="checkbox"/> Other _____ <small>(See "Signing Your Offer" provision.)</small>
AUTHORIZED SIGNATURE <small>(Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)</small>		
TITLE <small>(Business title of person signing above)</small>		
PRINTED NAME <small>(Printed name of person signing above)</small>	DATE SIGNED	

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the offeror above. An offer may be submitted by only one legal entity. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, *i.e.*, a separate corporation, partnership, sole proprietorship, etc.

STATE OF INCORPORATION (If offeror is a corporation, identify the state of Incorporation.)

TAXPAYER IDENTIFICATION NO. <small>(See "Taxpayer Identification Number" provision)</small>	BUSINESS LICENSE NO.
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COVER PAGE

(Return Cover Page with Your Offer)

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Invitation for Bids Solicitation Template

PAGE TWO

(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.)							
	Area Code	Number	Extension	Facsimile				
	E-mail Address							
PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause)	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders" clause)							
<input type="checkbox"/> Payment Address same as Home Office Address <input type="checkbox"/> Payment Address same as Notice Address (check only one)		<input type="checkbox"/> Order Address same as Home Office Address <input type="checkbox"/> Order Address same as Notice Address (check only one)						
ACKNOWLEDGMENT OF AMENDMENTS Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. See "Amendments to Solicitation" Provision	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date
DISCOUNT FOR PROMPT PAYMENT See "Discount for Prompt Payment" clause	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	____ Calendar Days (%)				
PREFERENCES – SC RESIDENT VENDOR PREFERENCE (June 2005): Section 11-35-1524 provides a preference for offerors that qualify as a resident vendor. A resident vendor is an offeror that (a) is authorized to transact business within South Carolina, (b) maintains an office* in South Carolina, (c) either (1) maintains a minimum \$10,000.00 representative inventory at the time of the solicitation, or (2) is a manufacturer which is headquartered and has at least a ten million dollar payroll in South Carolina, and the product is made or processed from raw materials into a finished end-product by such manufacturer or an affiliate (as defined in section 1563 of the Internal Revenue Code) of such manufacturer, and (d) has paid all assessed taxes. If applicable, preference will be applied as required by law.					OFFERORS REQUESTING THIS PREFERENCE MUST INITIAL HERE. _____ *ADDRESS AND PHONE OF IN-STATE OFFICE <input type="checkbox"/> In-State Office Address same as Home Office Address <input type="checkbox"/> In-State Office Address same as Notice Address <div style="text-align: right;">(CHECK ONLY ONE)</div>			
PREFERENCES – SC/US END-PRODUCT (June 2005): Section 11-35-1524 provides a preference to vendors offering South Carolina end-products or US end-products, if those products are made, manufactured, or grown in SC or the US, respectively. An end-product is the item identified for acquisition in this solicitation, including all component parts in final form and ready for the use intended. The terms "made," "manufactured," and "grown" are defined by Section 11-35-1524(B). By signing your offer and checking the appropriate space(s) provided and identified on the bid schedule, offeror certifies that the end-product(s) is either made, manufactured or grown in South Carolina, or other states of the United States, as applicable. Preference will be applied as required by law.					IF THIS PREFERENCE APPLIES TO THIS PROCUREMENT, PART VII (BIDDING SCHEDULE) WILL INCLUDE A PLACE TO CLAIM THE PREFERENCE. OFFERORS REQUESTING THIS PREFERENCE MUST CHECK THE APPROPRIATE SPACES ON THE BIDDING SCHEDULE.			

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SCOPE OF SOLICITATION

PROVIDE GENERAL OVERVIEW OF WORK TO BE DONE AND WHERE

Any resulting contract will be for a term of one year with four one-year options to renew. The estimated period of the first contract term is: ENTER DATE IF NECESSARY

MAXIMUM CONTRACT PERIOD – ESTIMATED: Dates provided are estimates only. Any resulting contract will begin on the date specified in the notice of award.

TERMS, CONDITIONS, AND INSTRUCTIONS TO OFFERORS

AMENDMENTS TO SOLICITATION: (a) The Solicitation may be amended at any time prior to opening. All actual and prospective Offerors should call number listed on page one. (b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

AWARD NOTIFICATION: Notice regarding any award or cancellation of award will be posted at the location specified on the Cover Page.

BID / PROPOSAL AS OFFER TO CONTRACT: By submitting Your Bid, You are offering to enter into a contract with the Using Governmental Unit listed on the Cover Page. Without further action by either party, a binding contract shall result upon final award. Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror on the Cover Page. An Offer may be submitted by only one legal entity; “joint bids” are not allowed.

BID ACCEPTANCE PERIOD: In order to withdraw Your Offer after the minimum period specified on the Cover Page, You must notify the Procurement Officer in writing.

BID IN ENGLISH & DOLLARS: Offers submitted in response to this solicitation shall be in the English language and in US dollars, unless otherwise permitted by the Solicitation.

COMPLETION OF FORMS / CORRECTION OF ERRORS: All prices and notations should be printed in ink or typewritten. Errors should be crossed out, corrections entered and initialed by the person signing the bid. Do not modify the solicitation document itself (including bid schedule).

DEADLINE FOR SUBMISSION OF OFFER: Any offer received after the Procurement Officer of the governmental body or his designee has declared that the time set for opening has arrived, shall be rejected.

DESCRIPTIVE LITERATURE – LABELLING: Include offeror’s name on the cover of any specifications or descriptive literature submitted with your offer.

DISCOUNT FOR PROMPT PAYMENT: Discounts for prompt payment will not be considered in the evaluation of offers. However, any offered discount will form a part of the award, and will be taken if payment is made within the discount period indicated in the offer by the offeror. As an alternative to offering a discount for prompt payment in conjunction with the offer, offerors awarded contracts may include discounts for prompt payment on individual invoices.

DISCUSSIONS WITH BIDDERS: After opening, the Procurement Officer may, in his sole discretion, initiate discussions with you to discuss your bid. Discussions are possible only if your bid is apparently responsive and only for the purpose of clarification to assure your full understanding of the solicitation's requirements. Any discussions will be documented in writing and shall be included with the bid.

OMIT TAXES FROM PRICE: Do not include any sales or use taxes in Your price.

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PUBLIC OPENING: Offers will be publicly opened at the date / time and at the location identified on the Cover Page, or last Amendment, whichever is applicable.

PURCHASE ORDERS: Contractor shall not perform any work prior to the receipt of a purchase order from the using governmental unit. The using governmental unit shall order any supplies or services to be furnished under this contract by issuing a purchase order. Purchase orders may be used to elect any options available under this contract, e.g., quantity, item, delivery date, payment method, but are subject to all terms and conditions of this contract. Purchase orders may be electronic.

QUESTIONS FROM OFFERORS: (a) Any prospective offeror desiring an explanation or interpretation of the solicitation, drawings, specifications, etc., must request it in writing. Questions must be received by the Procurement Officer no later than five (5) days prior to opening unless otherwise stated on the Cover Page. Label any communication regarding your questions with the name of the procurement officer, and the solicitation's title and number. Oral explanations or instructions will not be binding. Any information given a prospective offeror concerning a solicitation will be furnished promptly to all other prospective offerors as an Amendment to the solicitation, if that information is necessary for submitting offers or if the lack of it would be prejudicial to other prospective offerors. (b) The Using Governmental Unit seeks to permit maximum practicable competition. Offerors are urged to advise the Procurement Officer – as soon as possible – regarding any aspect of this procurement, including any aspect of the Solicitation that unnecessarily or inappropriately limits full and open competition.

SIGNING YOUR OFFER: Every Offer must be signed by an individual with actual authority to bind the Offeror. (a) If the Offeror is an individual, the Offer must be signed by that individual. If the Offeror is an individual doing business as a firm, the Offer must be submitted in the firm name, signed by the individual, and state that the individual is doing business as a firm. (b) If the Offeror is a partnership, the Offer must be submitted in the partnership name, followed by the words “by its Partner,” and signed by a general partner. (c) If the Offeror is a corporation, the Offer must be submitted in the corporate name, followed by the signature and title of the person authorized to sign. (d) An Offer may be submitted by a joint venturer involving any combination of individuals, partnerships, or corporations. If the Offeror is a joint venture, the Offer must be submitted in the name of the Joint Venture and signed by every participant in the joint venture in the manner prescribed in paragraphs (a) through (c) above for each type of participant. (e) If an Offer is signed by an agent, other than as stated in subparagraphs (a) through (d) above, the Offer must state that it has been signed by an Agent. Upon request, Offeror must provide proof of the agent's authorization to bind the principal.

SUBMITTING YOUR OFFER OR MODIFICATION: (a) Offers and offer modifications shall be submitted in sealed envelopes or packages (unless submitted by electronic means) – (1) Addressed to the office specified in the Solicitation; and (2) Showing the time and date specified for opening, the solicitation number, and the name and address of the bidder. (b) If you are responding to more than one solicitation, each offer must be submitted in a different envelope or package. (c) Each Offeror must submit the number of copies indicated on the Cover Page. (d) Offerors using commercial carrier services shall ensure that the Offer is addressed and marked on the outermost envelope or wrapper as prescribed in paragraphs (a)(1) and (2) of this provision when delivered to the office specified in the Solicitation. (e) Facsimile or e-mail offers, modifications, or withdrawals, will not be considered unless authorized by the Solicitation. (f) Offers submitted by electronic commerce shall be considered only if the electronic commerce method was specifically stipulated or permitted by the solicitation.

TAXPAYER IDENTIFICATION NUMBER: (a) If Offeror is owned or controlled by a common parent as defined in paragraph (b) of this provision, Offeror shall submit with its Offer the name and TIN of common parent.

(b) Definitions: "Common parent," as used in this provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the offeror is a member. "Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a Social Security Number or an Employer Identification Number.

(c) If Offeror does not have a TIN, Offeror shall indicate if either a TIN has been applied for or a TIN is not required. If a TIN is not required, indicate whether (i) Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States; (ii) Offeror is an agency or instrumentality of a state or local government; (iii) Offeror is an agency or instrumentality of a foreign government; or (iv) Offeror is an agency or instrumentality of the Federal Government.

APPENDIX B: Invitation for Bids Instructions and Templates

Invitation for Bids Solicitation Template

WITHDRAWAL OR CORRECTION OF OFFER: Offers may be withdrawn by written notice received at any time before the exact time set for opening. If the Solicitation authorizes facsimile offers, offers may be withdrawn via facsimile received at any time before the exact time set for opening. A bid may be withdrawn in person by a bidder or its authorized representative if, before the exact time set for opening, the identity of the person requesting withdrawal is established and the person signs a receipt for the bid.

*****You must define how each offeror must submit their bid.*****

OFFERING BY ITEM: Offers may be submitted for one or more items.

UNIT PRICES REQUIRED: Unit price to be shown for each item.

SCOPE OF WORK / SPECIFICATIONS

*****Note: If item to be delivered, be sure to mandate inside delivery by default, unless otherwise requested. Delivery costs are to be included in the bid price and also defined independently.*****

INFORMATION FOR OFFERORS TO SUBMIT

*****List any documentation you would like the offerors to submit with their bid here.*****

Include with your bid a list of any professional organizations of which you may be a member (Local Chamber, Contractor's Association, etc).

Attach to your bid proof of any insurance and/or bond covering the type of work described above in the section titled SCOPE OF WORK / SPECIFICATIONS.

With your bid you must attach three references for whom you have conducted work of an equivalent type and scope.

QUALIFICATIONS

*****State any required qualifications for your bidders here. Request documentation regarding these qualifications in the section above.*****

AWARD CRITERIA

*****You must define exactly how you will be determining which bidder(s) will receive an award*****

AWARD BY ITEM: Award will be made by individual item.

AWARD CRITERIA – BIDS: Award will be made to the lowest responsible and responsive bidder(s).

AWARD TO MULTIPLE OFFERORS: Award may be made to more than one Offeror.

UNIT PRICE GOVERNS (JAN 2006): In determining award, unit prices will govern over extended prices unless otherwise stated.

APPENDIX B: Invitation for Bids Instructions and Templates

Invitation for Bids Solicitation Template

BIDDING SCHEDULE

Unless otherwise noted, the price of each item must be inclusive of any additional charges such as shipping, with the exception of tax.

LOT A: [REDACTED]

Lot A Specifications: [REDACTED]

Delivery Location / Time: [REDACTED]

Agency Req.:					
Item	Commodity	Quantity	Unit Of Measure	Unit Price	Price
1	[REDACTED]	[REDACTED]	[REDACTED]		
Description: [REDACTED]					

DELIVERY FEE: \$ [REDACTED]

LABOR COST: [REDACTED] \$ [REDACTED]

MATERIALS COST: \$ [REDACTED]

SC END PRODUCT [REDACTED] YES [REDACTED] NO [REDACTED] US END PRODUCT [REDACTED] YES [REDACTED] NO [REDACTED]

WARRANTY: [REDACTED]

PARTS: [REDACTED]

LABOR: [REDACTED]

DO YOU HAVE INSURANCE OR ARE BONDED TO COVER THE TYPE OF WORK DESCRIBED IN THE SPECIFICATIONS? IF YES, PLEASE ATTACH PROOF OF SUCH TO YOUR BID AS DESCRIBED ABOVE IN THE SECTION TITLED INFORMATION FOR OFFERORS TO SUBMIT. YES [REDACTED] NO [REDACTED]

Note: Successful vendor must notify receiving section 24 hours prior to delivery. All deliveries will be F.O.B. destination, freight pre-paid. Unless other wise noted, inside delivery will be provided.

IX. ATTACHMENTS TO SOLICITATION

*****You may include additional attachments if necessary*****

- Important Tax Notice – Nonresidents Only
- Nonresident Taxpayer Registration Affidavit – Income Tax Withholding (I-312)
- Offeror's Checklist

APPENDIX B: Invitation for Bids Instructions and Templates

Invitation for Bids Solicitation Template

IMPORTANT TAX NOTICE - NONRESIDENTS ONLY

Withholding Requirements for Payments to Nonresidents: Section 12-8-550 of the South Carolina Code of Laws requires persons hiring or contracting with a nonresident conducting a business or performing personal services of a temporary nature within South Carolina to withhold 2% of each payment made to the nonresident. The withholding requirement does not apply to (1) payments on purchase orders for tangible personal property when the payments are not accompanied by services to be performed in South Carolina, (2) nonresidents who are not conducting business in South Carolina, (3) nonresidents for contracts that do not exceed \$10,000 in a calendar year, or (4) payments to a nonresident who (a) registers with either the S.C. Department of Revenue or the S.C. Secretary of State and (b) submits a Nonresident Taxpayer Registration Affidavit - Income Tax Withholding, Form I-312 to the person letting the contract.


The withholding requirement applies to every governmental entity that uses a contract ("Using Entity"). Nonresidents should submit a separate copy of the Nonresident Taxpayer Registration Affidavit - Income Tax Withholding, Form I-312 to every Using Entity that makes payment to the nonresident pursuant to this solicitation. Once submitted, an affidavit is valid for all contracts between the nonresident and the Using Entity, unless the Using Entity receives notice from the Department of Revenue that the exemption from withholding has been revoked.

Section 12-8-540 requires persons making payment to a nonresident taxpayer of rentals or royalties at a rate of \$1,200.00 or more a year for the use of or for the privilege of using property in South Carolina to withhold 7% of the total of each payment made to a nonresident taxpayer who is not a corporation and 5% if the payment is made to a corporation. Contact the Department of Revenue for any applicable exceptions.

For information about other withholding requirements (e.g., employee withholding), contact the Withholding Section at the South Carolina Department of Revenue at 803-898-5383 or visit the Department's website at www.sctax.org.

This notice is for informational purposes only. This agency does not administer and has no authority over tax issues. All registration questions should be directed to the License and Registration Section at 803-898-5872 or to the South Carolina Department of Revenue, Registration Unit, Columbia, S.C. 29214-0140. All withholding questions should be directed to the Withholding Section at 803-898-5383.

APPENDIX B: Invitation for Bids Instructions and Templates
Invitation for Bids Solicitation Template

	<p>STATE OF SOUTH CAROLINA DEPARTMENT OF REVENUE</p> <p>NONRESIDENT TAXPAYER REGISTRATION AFFIDAVIT INCOME TAX WITHHOLDING</p>	<p>I-312 (Rev. 5/7/04) 3323</p>
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The undersigned nonresident taxpayer on oath, being first duly sworn, hereby certifies as follows:

1. Name of Nonresident Taxpayer:	
2. Trade Name, if applicable (Doing Business As):	
3. Mailing Address:	
4. Federal Identification Number:	
5. Hiring or Contracting with:	
Name:	
Address:	
Receiving Rentals or Royalties From:	
Name:	
Address:	
Beneficiary of Trusts and Estates:	
Name:	
Address:	

6. I hereby certify that the above named nonresident taxpayer is currently registered with

(check the appropriate box):

- ☐ The South Carolina Secretary of State or
☐ The South Carolina Department of Revenue

Date of Registration: _____

7. I understand that by this registration, the above named nonresident taxpayer has agreed to be subject to the jurisdiction of the South Carolina Department of Revenue and the courts of South Carolina to determine its South Carolina tax liability, including estimated taxes, together with any related interest and penalties.

8. I understand the South Carolina Department of Revenue may revoke the withholding exemption granted under Code Sections 12-8-540 (rentals), 12-8-550 (temporarily doing business or professional services in South Carolina), and 12-8-570 (distributions to nonresident beneficiary by trusts or estates) at any time it determines that the above named nonresident taxpayer is not cooperating with the Department in the determination of its correct South Carolina tax liability.

The undersigned understands that any false statement contained herein could be punished by fine, imprisonment or both.

Recognizing that I am subject to the criminal penalties under Code Section 12-54-44 (B) (6) (a) (i), I declare that I have examined this affidavit and to the best of my knowledge and belief, it is true, correct and complete.

(Seal)

Signature of Nonresident Taxpayer (Owner, Partner or Corporate Officer, when relevant)

Date

If Corporate officer state title:

(Name - Please Print)

Mail to: The company or individual you are contracting with.

APPENDIX B: Invitation for Bids Instructions and Templates
Invitation for Bids Solicitation Template

OFFEROR'S CHECKLIST

AVOID COMMON BID/PROPOSAL MISTAKES


Review this checklist prior to submitting your bid/proposal.
If you fail to follow this checklist, you risk having your bid/proposal rejected.

- DO NOT INCLUDE ANY OF YOUR STANDARD CONTRACT FORMS!
- UNLESS EXPRESSLY REQUIRED, DO NOT INCLUDE ANY ADDITIONAL BOILERPLATE CONTRACT CLAUSES.
- REREAD YOUR ENTIRE BID/PROPOSAL TO MAKE SURE YOUR BID/PROPOSAL DOES NOT TAKE EXCEPTION TO ANY OF THE STATE'S MANDATORY REQUIREMENTS.
- MAKE SURE YOU HAVE PROPERLY MARKED ALL PROTECTED, CONFIDENTIAL, OR TRADE SECRET INFORMATION IN ACCORDANCE WITH THE INSTRUCTIONS ENTITLED: SUBMITTING CONFIDENTIAL INFORMATION. ***DO NOT MARK YOUR ENTIRE BID/PROPOSAL AS CONFIDENTIAL, TRADE SECRET, OR PROTECTED! DO NOT INCLUDE A LEGEND ON THE COVER STATING THAT YOUR ENTIRE RESPONSE IS NOT TO BE RELEASED!***
- HAVE YOU PROPERLY ACKNOWLEDGED ALL AMENDMENTS? INSTRUCTIONS REGARDING HOW TO ACKNOWLEDGE AN AMENDMENT SHOULD APPEAR IN ALL AMENDMENTS ISSUED.
- MAKE SURE YOUR BID/PROPOSAL INCLUDES A COPY OF THE SOLICITATION COVER PAGE. MAKE SURE THE COVER PAGE IS SIGNED BY A PERSON THAT IS AUTHORIZED TO CONTRACTUALLY BIND YOUR BUSINESS.
- MAKE SURE YOUR BID/PROPOSAL INCLUDES THE NUMBER OF COPIES REQUESTED.
- CHECK TO ENSURE YOUR BID/PROPOSAL INCLUDES EVERYTHING REQUESTED!
- IF YOU HAVE CONCERNS ABOUT THE SOLICITATION, DO NOT RAISE THOSE CONCERNS IN YOUR RESPONSE! **AFTER OPENING, IT IS TOO LATE! IF THIS SOLICITATION INCLUDES A PRE-BID/PROPOSAL CONFERENCE OR A QUESTION & ANSWER PERIOD, RAISE YOUR QUESTIONS AS A PART OF THAT PROCESS!** PLEASE SEE INSTRUCTIONS UNDER THE HEADING "SUBMISSION OF QUESTIONS" AND ANY PROVISIONS REGARDING PRE-BID/PROPOSAL CONFERENCES.

This checklist is included only as a reminder to help offerors avoid common mistakes.
Responsiveness will be evaluated against the solicitation, not against this checklist.
You do not need to return this checklist with your response

APPENDIX B: Invitation for Bids Instructions and Templates

Invitation for Bid Amendment Template

	State of South Carolina Amendment No. [REDACTED]	Solicitation Number	[REDACTED]
		Date Printed	7/20/2009
		Date Issued	[REDACTED]
		Procurement Officer	[REDACTED]
		Phone	[REDACTED]
		E-Mail Address	[REDACTED]

DESCRIPTION: [REDACTED]
 USING GOVERNMENTAL UNIT: [REDACTED] *Board Name*

The Term "Offer" Means Your "Bid" or "Proposal".

SUBMIT OFFER BY (Opening Date/Time): [REDACTED] See "Deadline For Submission Of Offer" provision
 QUESTIONS MUST BE RECEIVED BY: [REDACTED] See "Questions From Offerors" provision
 NUMBER OF COPIES TO BE SUBMITTED: **One (1) original and One (1) copy (marked 'copy')**

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

MAILING ADDRESS:

PHYSICAL ADDRESS:

See "Submitting Your Offer" provision

CONFERENCE TYPE: [REDACTED] DATE & TIME: [REDACTED]	LOCATION: [REDACTED]
As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions	
AWARD & AMENDMENTS	The award, this solicitation, and any amendments to this solicitation will be publicly displayed at the bid opening location on the date award is made. Bidders who would like to receive a copy of the award statement must enclose a self addressed stamped envelope.

You must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the Opening Date.

NAME OF OFFEROR <small>(Full legal name of business submitting the offer)</small>		OFFEROR'S TYPE OF ENTITY: <small>(Check one)</small> <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local) <input type="checkbox"/> Other _____ <small>(See "Signing Your Offer" provision.)</small>
AUTHORIZED SIGNATURE <small>(Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)</small>		
TITLE <small>(Business title of person signing above)</small>		
PRINTED NAME <small>(Printed name of person signing above)</small>	DATE SIGNED	

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the offeror above. An offer may be submitted by only one legal entity. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, *i.e.*, a separate corporation, partnership, sole proprietorship, etc.

STATE OF INCORPORATION <small>(If offeror is a corporation, identify the state of Incorporation.)</small>	
TAXPAYER IDENTIFICATION NO. <small>(See "Taxpayer Identification Number" provision)</small>	STATE VENDOR NO. <small>(Register to Obtain S.C. Vendor No. at www.procurement.sc.gov)</small>

APPENDIX B: Invitation for Bids Instructions and Templates
Invitation for Bid Amendment Template
PAGE TWO

(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause)			
	Area Code	Number	Extension	Facsimile
	E-mail Address			
PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause)	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders" and "Contract Documents" clauses)			
<input type="checkbox"/> Payment Address same as Home Office Address <input type="checkbox"/> Payment Address same as Notice Address (check only one)	<input type="checkbox"/> Order Address same as Home Office Address <input type="checkbox"/> Order Address same as Notice Address (check only one)			

ACKNOWLEDGMENT OF AMENDMENTS Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. See "Amendments to Solicitation" Provision	Amendment t No.	Amendment Issue Date	Amendment t No.	Amendment Issue Date	Amendment No.	Amendment t Issue Date	Amendment No.	Amendment Issue Date

DISCOUNT FOR PROMPT PAYMENT See "Discount for Prompt Payment" clause	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	____ Calendar Days (%)
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PREFERENCES – SC RESIDENT VENDOR PREFERENCE (June 2005): Section 11-35-1524 provides a preference for offerors that qualify as a resident vendor. A resident vendor is an offeror that (a) is authorized to transact business within South Carolina, (b) maintains an office* in South Carolina, (c) either (1) maintains a minimum \$10,000.00 representative inventory at the time of the solicitation, or (2) is a manufacturer which is headquartered and has at least a ten million dollar payroll in South Carolina, and the product is made or processed from raw materials into a finished end-product by such manufacturer or an affiliate (as defined in section 1563 of the Internal Revenue Code) of such manufacturer, and (d) has paid all assessed taxes. If applicable, preference will be applied as required by law.	OFFERORS REQUESTING THIS PREFERENCE MUST INITIAL HERE. _____ *ADDRESS AND PHONE OF IN-STATE OFFICE <input type="checkbox"/> In-State Office Address same as Home Office Address <input type="checkbox"/> In-State Office Address same as Notice Address <div style="text-align: right;">(CHECK ONLY ONE)</div>
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PREFERENCES – SC/US END-PRODUCT (June 2005): Section 11-35-1524 provides a preference to vendors offering South Carolina end-products or US end-products, if those products are made, manufactured, or grown in SC or the US, respectively. An end-product is the item identified for acquisition in this solicitation, including all component parts in final form and ready for the use intended. The terms "made," "manufactured," and "grown" are defined by Section 11-35-1524(B). By signing your offer and checking the appropriate space(s) provided and identified on the bid schedule, offeror certifies that the end-product(s) is either made, manufactured or grown in South Carolina, or other states of the United States, as applicable. Preference will be applied as required by law.	IF THIS PREFERENCE APPLIES TO THIS PROCUREMENT, PART VII (BIDDING SCHEDULE) WILL INCLUDE A PLACE TO CLAIM THE PREFERENCE. OFFERORS REQUESTING THIS PREFERENCE MUST CHECK THE APPROPRIATE SPACES ON THE BIDDING SCHEDULE.
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APPENDIX B: Invitation for Bids Instructions and Templates

Invitation for Bid Amendment Template

AMENDMENTS TO SOLICITATION (JAN 2004): (a) The Solicitation may be amended at any time prior to opening. All actual and prospective Offerors should monitor the following web site for the issuance of Amendments: www.procurement.sc.gov. (b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

ENTER AMENDMENT DETAILS HERE

ATTACHEMENTS MAY BE ADDED THOUGH
THEY MUST BE REFERENCED IN THIS SPACE

APPENDIX B: Invitation for Bids Instructions and Templates
Invitation for Bid Verification Sheet
Solicitation Verification Sheet - IFB

Solicitation #: [REDACTED]

Solicitation Title: [REDACTED] Linen Services – Coastal Center

Vendor: [REDACTED] OPTIONAL-FILL OUT AFTER AWARD

Item	Verified By	Date
Purchasing Requisition		
SCBO Advertisement (When anticipated cost is above \$10,000)		
Vendor List		
Purchase Order		
Invitation for Bid		
Amendment (If Applicable)		
Bidders Sign-In Sheet		
Bid Tally Sheet		
Award Statement – (File Copy In Awards Notebook)		
Multi-Term Contract Determination (If Applicable)		
Certificate of Liability Insurance		
Complete Bid Package Sent to DDSN		

APPENDIX B: Invitation for Bids Instructions and Templates
Bid Tally Sheet

(Name of Board)

SOLICITATION
NUMBER:

SOLICITATION
TITLE:

DATE:

VENDOR	In-State Preference	S.C. End-Product	U.S. End-Product	Adjusted Price	Price	Item 1			

Opened By:

Witnessed By:

APPENDIX B: Invitation for Bids Instructions and Templates
Invitation for Bids Award Template

SOUTH CAROLINA DEPARTMENT OF DISABILITIES AND SPECIAL NEEDS

(BOARD NAME)

STATEMENT OF CONTRACT AWARD

SOLICITATION NUMBER: [REDACTED]

SOLICATION TITLE: [REDACTED]

SOLICITATION ISSUE DATE: [REDACTED]

SUBMISSION DEADLINE: [REDACTED]

AWARD DATE: [REDACTED]

Executive Director
(Board Name)

AWARD(S) ARE MADE TO THE FOLLOWING:

VENDOR: [REDACTED]
[REDACTED]
[REDACTED]

Lot A/Total Price \$ [REDACTED]

Start Date: [REDACTED]

Total Potential Value: [REDACTED]

Maximum Contract Period: [REDACTED]

AWARD NOTES:

1. USING REGION WILL ISSUE ALL PURCHASE ORDERS FOR THIS CONTRACT.
2. REFER TO ORIGINAL SOLICITATION DOCUMENT FOR APPLICABLE OPTION TO EXTEND REQUIREMENTS.
3. TAX IS NOT INCLUDED IN THIS AWARD. APPLICABLE TAXES MAY BE ADDED TO INVOICE(S).
4. RIGHTS OF PROTEST- ANY PROSPECTIVE BIDDER, OFFEROR, CONTRACTOR OR SUBCONTRACTOR WHO BELIEVES THAT THEY HAVE BEEN AGGRIEVED IN CONNECTION WITH THIS SOLICITATION OR SUBSEQUENT AWARD OF A CONTRACT, SHALL EXERCISE THEIR RIGHT TO PROTEST AS SET FORTH. UNDER SECTION 11-35-4210 OF THE SOUTH CAROLINA CONSOLIDATED PROCUREMENT CODE AND ANY REVISIONS THEREOF.
5. QUOTES RECEIVED AT LESS THAN THAT OF AWARD WERE REJECTED AS THEY DID NOT MEET ADVERTISTED SPECIFICATIONS OR REQUESTED AND RECEIVED APPROVAL FOR THEIR QUOTE TO BE WITHDRAWN.

cc: Consumer
DDSN
Vendor